Volume I. LSSI Technical Proposal for Stockton-San Joaquin County Public Library Operation Services

Proposal in Response to:

San Joaquin County
RFP # 09-40 for Public Library Operation Services
Dated May 7, 2010

Due Date: June 10, 2010: 3:00 p.m. PDT

Submitted to:
Purchasing Agent, County of San Joaquin
44 N. San Joaquin Street, Suite 540
Stockton, CA 95202-2931

Library Systems & Services, LLC
12850 Middlebrook Road, Suite 400
Germantown, MD 20874-5244
www.lssi.com


LSSI is an Equal Opportunity Employer
June 10, 2010

Mr. Jon Drake  
San Joaquin County  
Purchasing & Support Services  
44 N. San Joaquin St, Suite 540  
Stockton, CA 95202-2931

RE: Proposal in response to the San Joaquin County RFP # 09-40

Dear Mr. Drake:

LSSI is pleased to respond to San Joaquin County’s Request for Proposals for the administration and operation of the Stockton-San Joaquin County Public Library System and welcomes the opportunity to offer the residents of the County and City library services with increased hours and improved services in a more efficient and affordable service model. Our solution will restore the Stockton-San Joaquin County Public Library System to the role of a vibrant community centerpiece that it once enjoyed.

Our proposal describes how LSSI can work with San Joaquin County and the City of Stockton to improve services in your library locations and Bookmobile. With LSSI’s purchasing plans for books and materials, the libraries’ materials budget will go further, providing more new books and materials for library users. Perhaps equally important, a partnership with LSSI will enable the County and City to retain local control of the libraries, being responsible for all policies and assets while directing the Library’s operations and day-to-day activities through a company with nearly thirty years of library experience and a solid track record of outstanding performance.

If County and City officials so choose, LSSI will also help the libraries join the Inland Library System, which includes Riverside County Library System, as well as the San Bernardino County, Victorville, Murrieta, Moreno Valley, College of the Desert, and Inyo County Libraries. This would offer San Joaquin and Stockton libraries use of that network’s Integrated Library System.

For nearly three decades, LSSI’s sole business has been providing innovative services and products to libraries, a specialization that focuses all of our corporate resources on this single operational area. During this time, LSSI has become recognized as the leader in the provision of outsourced library services. We partner with communities of all types and sizes, ranging from the City of Red Oak, Texas with a population of 10,000, to Riverside County, California with nearly two million residents. LSSI’s corporate philosophy is to work as a team with our customers, adding our expertise to that of the local authorities, community library groups, and local library staff members to ensure the best possible service levels are achieved.

LSSI Headquarters Office  
12850 Middlebrook Road, Suite 400 . Germantown, MD 20874 . 301/540-5100 . 301/540-5522 fax
Since 1997, LSSI has operated the Riverside County Library System, which has expanded under LSSI’s administration from twenty-five to thirty-three branches and two bookmobiles. Other California libraries LSSI operates include the Moorpark Library and the three-branch Shasta Public Libraries. LSSI also staffs and operates the fifteen-branch Jackson County, Oregon Library System. In Texas, LSSI operates libraries for the cities of Red Oak, Leander, and San Juan. LSSI also operates seven public libraries for four cities and one county in Tennessee, as well as one county system in Kansas. In each case, under LSSI’s leadership the hours of operation, programming for the communities, and materials spending have increased substantially. In Riverside County alone, LSSI has helped to raise more than $3.5 million in supplemental funding to improve library services. Perhaps most importantly, each library has become a visible cornerstone of its community and a destination enjoyed by everyone.

LSSI provides highly qualified staff with directly relevant experience, as well as any necessary back-up staff or staffing replacements. LSSI will interview all current staff members who wish to remain with the system as well as those who were released when funding and hours were reduced and will give them preference during the hiring process. LSSI currently has a total staff of approximately 800 employees, more than 90 of whom are professional librarians with MLS degrees from ALA-accredited programs. LSSI’s staff members carefully adhere to all local operating standards and policies, and are flexible in providing whatever services are needed.

In summary, by contracting with LSSI for the operation of its libraries, San Joaquin County and the City of Stockton will enjoy:

- Longer hours of operation, an increase of as much as 47%,
- Improved customer service,
- An increased book and materials budget to 2007-08 levels, an increase of 250% over the 2009-10 budget,
- Nationally recognized award-winning programs tailored to the community,
- Improved technology,
- More efficiencies and lower costs,
- New supplemental funding sources.

In total, LSSI will offer the County and City a much greater return on their tax dollars invested in library services. LSSI’s proposal, including the prices proposed, is valid through June 30, 2011.

If you have any questions about this proposal, please call me on (301) 540-5100, extension 233. We look forward to partnering with San Joaquin County and the City of Stockton to provide innovative, progressive library administration and operation services to support improved customer service and efficiency in your libraries.

Cordially,

Frank A. Pezzanite
Chief Executive Officer (CEO)
IDENTIFICATION SHEET

RESPONDENT TO COMPLETE AND RETURN WITH PROPOSAL

Type or print the following information:

Company: Library Systems & Services, LLC

Address: 12850 Middlebrook Road, Suite 400

                      Germantown MD 20874-5244
                      (City) (State) (Zip)

Fed Tax ID#: 52-2003416

Name: Frank A. Pezzanite

Title: CEO

E-mail: frank.pezzanite@lssi.com

Signature

Telephone: (301) 540-5100

Fax: (301) 540-5522

Years in business: 29

Number of employees: Approximately 800

Name of insurance carriers:

Public Liability: Hartford

Expires: 12/1/2010

Workers' Compensation: First Comp

Expires: 3/1/2011
PROPOSAL AUTHORIZATION

SIGNATURE PAGE

The undersigned, having carefully read and examined this RFP, and being familiar with (1) all the conditions applicable to the work for which this proposal is submitted; (2) with availability of the required equipment, materials and labor hereby agrees to provide everything necessary to complete the work for which this proposal is submitted in accordance with the proposal documents for the amounts quoted herein and further agrees that if this proposal is accepted, within five (5) days after the contract is presented for acceptance, will execute, and mail a signed contract to the County of San Joaquin Purchasing Agent.

This Signature/Authorization page must be in your Proposal.

[Signature]
Signature of Authorized Agent

[June 10, 2010]
Date

[Printed Name]
Printed Name of Authorized Agent
LSSI PROPOSAL TO PROVIDE
PUBLIC LIBRARY SERVICES FOR
STOCKTON-SAN JOAQUIN COUNTY

TABLE OF CONTENTS

Cover Letter

Identification Sheet

Proposal Authorization Signature Page

Table of Contents

1. Executive Summary and Introduction

2. LSSI’s Technical Proposal

2.1 Identification Sheet (at front of document)

2.2 Description of the Proposer

2.2.1 Overview of LSSI History and Activities
2.2.2 Key Staff
2.2.3 References
2.2.4 Current, Pending or Past Litigation

2.3 Project Plan

2.3.1 LSSI’s Ability to Perform the Scope of Work
2.3.2 Implementation Timeline and Process
2.3.3 Approach

1.1 General Statement
1.2 Staffing
1.3 Hours of Operation
1.4 Circulating and Reference Materials
1.5 Planning and Performance Monitoring
1.6 Budget and Finance
1.7 Facilities and Equipment
1.8 Systems
1.9 Library Services and Programs
1.10 Community Relations
1.11 Deviations or Additions to the Scope of Work
2.3.4 Operational Plan
2.3.5 Staffing Plan
2.3.6 Technology Plan
2.3.7 Performance Benchmarks: Source and Monitoring
2.3.8 Relationships with Existing Vendors
2.3.9 Strategy to Vary Services with Funding Level Changes
2.3.10 Business Model
2.3.11 Potential Marketing Plan

2.4 Related Experience and References

2.5 Cost Proposals – Included in Volume II, in separate, sealed envelope

2.6 Contentions, Deviations, and Exceptions

Appendices

A. Resumes
B. Project Descriptions
C. Recent LSSI Press
D. Confirmation of Receipt of Addendum to the RFP
E. LSSI Sample Library Administration and Operations Agreement
F. List of Three References (page 18 of the RFP)
G. Non-Collusion Affidavit (page 19 of the RFP)
TECHNICAL PROPOSAL FOR
STOCKTON-SAN JOAQUIN COUNTY
PUBLIC LIBRARY OPERATION SERVICES

1. Executive Summary and Introduction

Executive Summary: Benefits to the Stockton-San Joaquin County Public Library System through a Partnership with LSSI

San Joaquin County and/or the City of Stockton can reap substantial benefits through a public/private partnership with LSSI, ensuring that each partner does what it does best: public officials define and oversee policies, and LSSI operates libraries according to the County and/or City’s contract provisions and policies.

- If the County and/or City choose to maintain current service hours, LSSI’s proposed library operations will save them 34% of the current budget figures provided with the RFP.

- If the County and/or City instead choose to maintain current funding levels, LSSI’s proposed library operations will keep the libraries open 47% longer, AND generate a substantial fund balance of 21% of the current budget figures provided with the RFP.

Consider the results of the 13-year public/private partnership between nearby Riverside County and LSSI. That partnership has --

- created a modern library system while keeping expenditures at only 50-65% of the average per capita expenditure for California libraries
- upgraded technology: the Riverside County libraries now have a fiber-optic broadband network, a Library 2.0 website, the first print-on-demand service in the state, RFID technology, IM reference services, and a strong social network presence
- secured more than $3.5 million of outside grant support
- increased circulation 70.4% since 2004-5
- increased attendance at library programs 150% since 2004-5
- overseen construction of 20 new libraries
- managed major renovations in seven additional library facilities
- replaced both bookmobiles
- added 189,000 square feet of public service space
- created new initiatives in early literacy, English as a Second Language, local history, and Latino outreach (which won three awards)
- been selected by ALA to host the annual Arbuthnot lecture
- In contrast to neighboring counties, instituted no hiring freezes, furloughs or lay-offs, and no reductions to library employee hours or wages
- established a $20 million rainy-day fund
A partnership between the County and/or City and LSSI would guarantee uninterrupted continuation of library services through the immediate on-site activities of the LSSI Transition Team to hire and train employees, meet and engage community partners, and enhance physical library settings as quickly as possible.

LSSI would assume the risk inherent in doing business in the current fluctuating economic times by guaranteeing a defined level of services for a contracted amount of funding. Public decision-makers would govern the provision of library services and monitor the quality of those services in order to maintain accountability to taxpayers for the expenditure of public monies.

**Introduction**

In its report, “The Condition of U.S. Libraries: Trends, 1999-2009,” the American Library Association describes various types of libraries, their funding, and their services from numerous perspectives and in different types of communities. What emerges is a clear picture of Americans’ reliance on their libraries: usage is increasing (both in person and online) along with a growing appreciation of the role of libraries in their communities. In a January 2009 telephone survey, for example, a research firm hired by ALA found that more than 217 million Americans agree or strongly agree that the public library improves the quality of life in their communities.

But because of severely challenged local and state finances, as well as the growing need for authorities to direct resources toward other societal needs, resources supporting library operations are actually declining. Often, in response to these dire financial straits, authorities have chosen to decrease services; indeed, more than 2400 libraries nationwide have cut back their hours and many have had to close entirely.

The City of Stockton and San Joaquin County officials know this story only too well: repeatedly in the recent past, they have been forced to reduce services in the county and city libraries and the bookmobile for financial reasons. In addition, they were forced to furlough employees twelve days in 2009-10.

Officials of the County and the City of Stockton are seeking alternatives for the delivery of library services in order to provide more services at the current level of funding or to save substantial monies if the libraries maintain the current reduced schedule. What follows is the plan proposed by Library Systems & Services, LLC to assume responsibility for the day-to-day operation of the Stockton-San Joaquin County Public Library System while local public officials continue to define library policy, own the library facilities, oversee the library collections, retain ownership of all other library assets, and monitor LSSI’s performance. Under LSSI’s proposal, San Joaquin County and the City of Stockton officials would increase the accountability of and governance over their library operations and finances through the outsourcing of day-to-day library operations. Sixty-three other communities in the US have already realized these benefits through their current contracts with LSSI to provide library administration and operation services. Contrary to the current trend toward library closures and service reductions, these sixty-three communities have seen no reductions in library hours, services or materials available.
for use. The following discussion draws on LSSI’s extensive experience in library operations and administration.

2. LSSI’s Technical Proposal

2.1 Identification Sheet (follows transmittal letter)

2.2 Description of the Proposer

2.2.1 Overview of LSSI History and Activities

LSSI is the premier company providing library administrative services to cities and counties in the United States. Today LSSI operates 63 public library facilities with a staff of approximately 550 people in its public libraries division, including more than 90 MLS-degreed professional librarians. We have provided services to public libraries since 1997, and to federal and corporate libraries since 1981. In California, LSSI currently operates the Riverside County Library System, with 33 branches and two bookmobiles; the Moorpark Library; and the three facilities of the Shasta Public Libraries. We also manage the fifteen-branch Jackson County, Oregon library system; seven public libraries in Tennessee, including the Germantown, Tennessee Regional Genealogy and History Center; three libraries in Texas; and one library in Kansas. Five of these library systems are county-wide systems like San Joaquin’s: Riverside and Shasta counties in California; Finney County, Kansas; Jackson County, Oregon; and Madison County, Tennessee. In each setting, LSSI’s services have increased the hours of operation, number of items circulated, number of programs presented, and overall usage of the public libraries. LSSI has included additional information about our experience and current customers, including references, in Sections 2.2.3, 2.3.1 and 2.4.

2.2.2 Key Staff

LSSI staffs the libraries we serve with the highest levels of library expertise at the lowest possible costs. Of our total workforce of approximately 800 people nationwide, approximately 550 work in LSSI-administered public libraries, and more than 90 have an MLS degree from an ALA-accredited college or university. We support their work with an off-site Management Team of senior-level library professionals, some with more than 30 years of experience in specialties including automation, collection development, children’s programming, literacy services, grant writing, marketing and outreach, recruiting, and long range planning. The LSSI Management Team participates actively in the establishment of library procedures and protocols during the transition period at the start of each contract and is available to the on-site library staff as needed throughout the contract term, at no additional cost.
The accomplishments of nine key members of LSSI’s Management Team are described briefly below; more detailed resumes are included in Appendix A.

Frank and Judy Pezzanite are the co-founders and owners of Library Systems & Services, LLC. As LSSI’s CEO, Frank Pezzanite has more than thirty-five years of experience working with library automation, including ground-breaking library systems and technology advances. Among his many accomplishments is the development of the award-winning MINI MARC minicomputer cataloging system, one of the first systems to use optical disk and compact disc technology; and the design and implementation of interlibrary loan networks for the states of Louisiana, Mississippi, Iowa, and part of Texas. He also spearheaded the development of LSSI’s Virtual Reference product and 24/7 reference call center capability.

Judy Pezzanite is an MLS-degree d librarian who has managed large library operations for nearly forty years. She has consulted on numerous projects with federal government agencies, and has directed staff performing a wide variety of technical library tasks. She was the author of the MARC Format Cards for Books, Serials, Visual Materials, Authority Data, and Holdings Data. Ms. Pezzanite is a member of LSSI’s Transition Team, and has been instrumental in the start-up of each of LSSI’s public library operations contracts. Together, Frank and Judy Pezzanite have advanced LSSI’s growth and development by building a unique and dynamic team of outstanding library professionals dedicated to delivering superior customer service. Their vision has enabled LSSI’s national network of community public libraries to grow. They continue to support and inspire LSSI’s library managers and staff in community libraries coast-to-coast from corporate bases in Maryland and California.

Ron Dubberly, LSSI’s President for Public Library Operations, offers each of our public library sites the benefits of his forty years of experience as a library director and consultant, including serving as Director of the Seattle (WA) Public Library and the Atlanta-Fulton County (GA) Public Library. During a decade as a library consultant, he helped libraries across the country with their building projects, strategic planning, service improvements, and planning for results. He is a past president of the Public Library Association (1978-80), and one of the moving forces behind that Association’s development of the Planning for Results Process. Mr. Dubberly was a member of the 1987 and 1998 committees responsible for publications to help librarians retool their planning processes to focus on results. He has also assisted local officials and national experts to improve important library functions such as collection development, programming, strategic planning, and professional development. He leads strategic planning sessions for LSSI’s customers, and provides guidance and mentoring to LSSI’s librarians throughout the country.

Mr. Dubberly is assisted in managing LSSI’s public library operations by two Vice Presidents, Mark Smith and Steve Coffman, who are themselves both well-known in the library world. As LSSI’s Vice President for Public Library Operations/West, Mark Smith oversees LSSI's west coast contracts with Moorpark, Riverside County and Shasta County in California, as well as with Jackson County, Oregon. Prior to joining LSSI in 1999, Mr. Smith worked as Director of Communications for the Texas State Library Association, the largest state library association in the U.S. and before that as the Library Systems Administrator for the Texas State Library and
Archives Commission. He previously worked as a library director in New Jersey. Mr. Smith has helped to secure more than $3.5 million in grants for the Riverside County Library System, and was instrumental in winning Riverside County the honor of hosting ALA’s prestigious Arbuthnot Lecture in spring 2010. He is the author of three books on library subjects, most recently co-authoring the title, “Training Library Staff and Volunteers to Provide Extraordinary Customer Service” (Neal-Schuman, 2006). He has published articles on libraries and library services for national and regional publications. He was selected as the 2003 California Library Association Member of the Year and played a key role in organizing the association to effectively win support from the US Congress for library initiatives. Mr. Smith will be the Vice President responsible for overseeing the Stockton-San Joaquin Library Operations; he will also serve as LSSI’s management representative and the designated liaison to the State of California with respect to funding matters, the California Library Association, and all local Friends of the Library groups.

Steve Coffman, LSSI’s Vice President for Public Library Operations/East, manages all library contracts for LSSI’s clients in Tennessee, Texas, and Kansas. Mr. Coffman has also headed LSSI’s Product Development team, concentrating particularly on the company’s Virtual Reference research and development project, including the creation and management of a 24/7 reference call center. Prior to joining LSSI in 2000, he pioneered web-based reference services for the Los Angeles County Public Library. He has published numerous articles for library publications including the conversation-starting “What If You Ran Your Library Like a Bookstore?” (American Libraries), and “Building Earth’s Largest Library” (Searcher). For LSSI, he has defined alternative library funding solutions, improved collection development and cataloging technologies, discussed the establishment of meaningful library metrics, and championed the codification and implementation of best practices for libraries. He is recognized as one of the library profession’s most forward thinkers and is frequently invited to speak at national and international library events.

State-of-the-art expertise will be particularly important to support effective and efficient technology systems for the Stockton-San Joaquin County Public Library System. LSSI offers the services of Luther Brady, LSSI’s Senior IT Manager/Network Administrator, who is based in our California offices. Mr. Brady has worked with a variety of integrated library systems and library networking products for more than twenty years, including positions with Dynix, GEAC, RetroLink, and AutoGraphics. This long career in library automation has allowed him to build an extensive network of contacts in the library vendor community, who help him to quickly resolve most technical issues. Among his recent accomplishments for LSSI-operated libraries are a total system migration in Finney County, KS from Horizon to Polaris; a re-write of the Riverside County Library System’s webpage to make it a true Library 2.0 site; the conversion of several of the Riverside County libraries from barcode symbology to RFID technology; and the preparation of cost-benefit analyses for public officials in anticipation of a variety of technology advances. Mr. Brady and his staff support technology enhancements in all LSSI-managed libraries nationwide; he will be the lead consultant for discussions and the resulting development of a Technology Plan in San Joaquin County (as described further in Section 2.3.6, below).
LSSI has a strong commitment to staff training and education, with a full-time professional trainer on our staff. **Jemima Perry**, LSSI’s Director of Training and Transition Services, serves all LSSI sites from a west coast base. Her curriculum varies based on local library requests for training as well as on corporately identified areas of library practice that are changing or evolving to meet new needs in the library profession. Ms. Perry has developed multimedia coursework for a variety of customer service topics, including dealing with difficult patrons, modeling and teaching customer service behaviors as a supervisor, and improving telephone etiquette. She also provides instructional sessions on topics such as harassment-free workplaces as mandated by federal or state regulations. Ms. Perry works closely with LSSI’s on-site staff members nationwide, provides access to professional development resources, and identifies sources of information accessible to all LSSI senior staff through their company-provided memberships in the American Library Association. She serves all LSSI sites as appropriate through a mixture of on-site and long-distance services.

Outstanding graphic arts support for all LSSI-administered libraries is provided by **Yesenia Araiza**, a professional graphic designer who has worked full-time in LSSI’s California office since 2006. She designs public relations materials such as posters, brochures, fliers, and bookmarks to promote programming for LSSI libraries nationwide. She has also designed library cards for all west coast locations, including an innovative set of four alternate designs from which users in Jackson County, Oregon can select when getting a new card. Ms. Araiza also designed the artwork for the eye-catching Riverside County Bookmobile launched in June 2008. In addition to LSSI libraries, the Southern California Library Cooperative (SCLC) contracted with LSSI to have Ms. Araiza design the publicity materials for the Statewide Día de los Niños/Día de los Libros web page; those designs can be viewed at [http://www.diacalifornia.org/](http://www.diacalifornia.org/). Her work has won the California Library Association’s PR Excellence award twice—once for materials produced for the Moorpark Library and once for products for Riverside County’s Temecula Library. In addition, the prestigious *Liquid Library Design* magazine has featured her work numerous times.

**Bob Windrow** is LSSI’s Vice President of Sales and Marketing and has more than 30 years of experience within the library industry. He has led LSSI’s sales and marketing activities since joining the company in 1990, most recently working with LSSI’s Management Team on an RFID project in Santa Clara County, California for a collection of 1.6 million items in eight branches and two bookmobiles. He began his career at Xerox as District Sales Manager and was named the Salesperson of the Year, then was Vice President of Sales with CLSI, an early ILS vendor. At Informatics Inc., Mr. Windrow was Director, Sales and Marketing for three years, developing successful advertising and promotion campaigns. Before joining LSSI, he was President/COO of Nationwide Fulfillment Systems, realigning middle management to focus on client services for a dramatic improvement in customer satisfaction.
2.2.3 References

Following is a list of LSSI’s current public library customers and their contact information. We encourage San Joaquin officials to contact any of these references. Detailed project descriptions for each of LSSI’s current public library contracts are included in Appendix B.

<table>
<thead>
<tr>
<th>Client</th>
<th>Contact Person</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington, TN</td>
<td>Russell Wiseman, Mayor</td>
<td>(901) 867-2620</td>
</tr>
<tr>
<td>Collierville, TN</td>
<td>James Lewellen, City Administrator</td>
<td>(901) 457-2200</td>
</tr>
<tr>
<td>Finney County, KS</td>
<td>Rocky Cook, Board of Library Trustees</td>
<td>(620) 272-3680</td>
</tr>
<tr>
<td>Germantown, TN</td>
<td>Sharon Goldsworthy, Mayor</td>
<td>(901) 757-7252</td>
</tr>
<tr>
<td>Jackson County, OR</td>
<td>Danny Jordan, County Administrator</td>
<td>(541) 774-6003</td>
</tr>
<tr>
<td>Jackson-Madison County, TN</td>
<td>Sharon Younger, Library Board Chair</td>
<td>(731) 668-7367</td>
</tr>
<tr>
<td>Leander, TX</td>
<td>Biff Johnson, City Manager</td>
<td>(512) 528-2712</td>
</tr>
<tr>
<td>Millington, TN</td>
<td>Richard Hodges, Mayor</td>
<td>(901) 872-2211</td>
</tr>
<tr>
<td>Moorpark, CA</td>
<td>Jennifer Mellon, Sr. Management Analyst</td>
<td>(805) 517-6247</td>
</tr>
<tr>
<td>Red Oak, TX</td>
<td>Tim Kelty, City Manager</td>
<td>(972) 617-6831</td>
</tr>
<tr>
<td>Riverside County, CA</td>
<td>Teresa Gallavan, Cultural Services Manager</td>
<td>(951) 955-8916</td>
</tr>
<tr>
<td>San Juan, TX</td>
<td>J.J. Rodriguez, City Manager</td>
<td>(956) 702-6420</td>
</tr>
<tr>
<td>Shasta County, CA</td>
<td>Peggy O’Lea, Library Foundation Director and Library Advisory Council Chair</td>
<td>(530) 246-0146</td>
</tr>
</tbody>
</table>

2.2.4 Current, Pending or Past Litigation

No litigation is currently pending. In the past five years, LSSI sought an administrative hearing in Florida regarding the interpretation of a state statute; and one former LSSI employee alleged discrimination after his dismissal, a charge that was subsequently found to be without merit.

2.3 Project Plan

2.3.1 LSSI’s Ability to Perform the Scope of Work

LSSI has thirteen years of experience in the operation of public libraries for cities and counties. Our goal is to provide the best possible library services for each community’s budget. To best leverage each customer’s resources, LSSI uses proven hands-on management techniques, new and improved library technology, the experience and skill sets of a team of senior-level managers, and the implementation of best practices for libraries. We establish metrics to chart our progress, and measure user satisfaction through surveys and comments.

LSSI uses the transition period between contract signing and the actual library re-opening to interview and hire/rehire staff, provide initial customer service training, perform LSSI’s Five
Star Assessment of the library facilities, collections, and systems, and review library policies and procedures.

Evidence that LSSI’s transition approach works can be found in highlights from our library operation contracts in Oregon and Tennessee:

- In Jackson County, Oregon, LSSI re-opened fifteen library branches less than three weeks after the signing of our contract, almost two weeks earlier than required by the county.
- LSSI re-opened the refurbished and reorganized Germantown (TN) Community Library with a well-trained and totally new staff in less than three weeks.
- Collierville, Tennessee’s Lucius E. and Elsie C. Burch, Jr. Library re-opened with a mix of incumbent and new staff members in only two weeks.
- In Germantown and Jackson, TN, existing resources were seamlessly integrated into the libraries’ new operational structure to maximize their usefulness. For example, LSSI reorganized library space in both locations to provide better line-of-sight for library staff members to monitor activities in the stacks and better security for library users.
- LSSI created special areas for teens and young adults in Collierville, Germantown, and Millington, TN by bringing together library resources that were previously scattered throughout the collections. We also created larger areas in which to hold library programs, particularly the programs for children and their parents.
- In Arlington, Millington, Germantown, Collierville, and Jackson, TN, LSSI installed bright new decorations to clearly identify children’s areas in the libraries so they could be seen from the libraries’ entrances, highlighting existing resources, and making them more attractive and exciting.

Many of LSSI’s accomplishments have appeared in the national or local press for each of the libraries we manage. In Appendix C, we have included a recent sampling of press coverage highlighting the accomplishments of LSSI-administered libraries. These articles include:

- American Libraries Association press release on the selection of the Riverside County Library to host the 2010 Arbuthnot Lecture
- Jackson (TN) Sun newspaper article about a recent Jack London “Big Read” project coordinated by the Jackson-Madison County Library
- Newswire press release about the print-on-demand project in Riverside County, CA
- American Libraries Association press release on the Germantown (TN) Community Library’s selection as a recipient of a special ALA Harry Potter exhibit
- March 2010 article announcing the unanimous vote in Shasta County, CA to renew LSSI’s library operations contract for another five years
- California Council for the Humanities February 10, 2010 article about the new MAD community dialog program being previewed in the Riverside County Library System

### 2.3.2 Implementation Timeline and Process

LSSI's timeline for implementing the scope of work ensures that services will continue without disruption, and that innovations and upgrades can be planned and implemented quickly. Our general approach is outlined below; this approach will be refined after consulting with San Joaquin officials at the time of contract signing.

**Implementation of a New Library Administration Contract: Quick, Multi-faceted Actions**

**Shortly after Contract Award**

- Advertise in local media for applicants.
- Meet with incumbent staff:
  - Introduce LSSI
  - Explain LSSI’s hiring process
  - Answer questions
- Hold introductory meetings with:
  - City and county leadership and other designated representatives, including the County Administrator and the City Manager
  - Friends of the Libraries organizations
  - Library volunteers
  - Other library stakeholders or interested parties
- Contact the Library’s existing vendors to begin transferring contracts and agreements to LSSI.
- Define staffing configurations for all locations.
- Staff the System:
  - Interview and evaluate all interested incumbent staff members
  - Make job offers
  - Interview and place new applicants as needed.
- Schedule and hold staff orientation session for all employees (incumbent and new)
  - Review LSSI benefits package
  - Discuss performance expectations and performance reviews
  - Discuss transition from public to private employment
  - Answer questions
- Perform LSSI’s Five-Star Assessment of current facilities, operations, programming, the collection, and immediate and long-term upgrades to match customer needs.
- Further refine the Transition Plan:
Incorporate relevant topics gleaned from the introductory meetings.
Incorporate any agreements reached during contract negotiations.
Incorporate any upgrades as needed, based on LSSI’s Five-Star Assessment.

- Review terms of relevant, existing contracts of vendors serving the libraries.
- Establish formats and timelines for required periodic financial reports.
- Establish formats and timelines for required performance reports.

**At Contract Start**

- Open all libraries and operate the Bookmobile as defined in the contract.
- Begin staff training, including customer service training.
- Begin service and possible operational enhancements (as described in this proposal and determined through contract negotiations).
- Implement plans for circulation, planning, performance monitoring, budgeting, furnishings, equipment (including self check-out), services, programs, and community outreach.
- Compile and submit sample monthly and annual performance reports.

The level and type of management resources provided by LSSI during the initial contract implementation will include substantial hands-on assistance from our Transition Team including Frank Pezzanite, Judy Pezzanite, Ron Dubberly, Mark Smith, Jemima Perry, Luther Brady, and, as needed, other corporate staff members who specialize in needed functions such as human resources, accounting, graphic design, and planning. Experience and areas of expertise for each key person are described in Section 2.2.2 above and in more detailed individual resumes in Appendix A.

**From Then on, To Maintain Progress and Momentum:**

**Midway Through First Year and Periodically Thereafter**

- Assess progress according to established milestones.
- Consult with San Joaquin leadership, community groups, other library stakeholders and staff regarding needed refinements.
- Revise plans for upcoming contract periods.

During contract start up and later implementation phases, the level and type of management resources provided by LSSI will include regular guidance and resource planning from LSSI’s senior-level Management Team, located on-site, in our California headquarters, or at other locations.

**2.3.3 Approach**

**1.1 General Statement**

LSSI’s plan for the operation of the San Joaquin Public Libraries emphasizes cost-effective administrative practices, corporate support from senior-level managers located in California and
elsewhere, and a comprehensive program of staff training. This plan will result in a well-trained staff with a customer-service focus, capable of performing a wide variety of library services.

LSSI will be responsible for:

- the proper administration of the overall Library budget, of which contracted services are only a part;
- being the County’s and/or City’s principal liaison with the State of California with respect to library funding matters;
- reviewing program development, collections, and community involvement activities, with an emphasis on ensuring that programming, services and collections are in line with community needs;
- representing San Joaquin County and/or the City of Stockton at relevant library meetings, including the annual California Library Association State Librarians’ Meeting.

1.2 Staffing

LSSI will staff the County and/or City libraries with experienced, well-qualified staff members who will provide services and programs to library customers during all hours the libraries are open to the public. LSSI emphasizes staff training in order to achieve outstanding results; in addition to basic library skills orientation, LSSI will also present a corporate orientation program for all employees to explain the unique responsibilities of contract staff members to the community, elected and appointed officials, Library Friends organizations, and other interested library stakeholders. LSSI has a full-time professional trainer on staff who will present various training programs to the staff, including such required programs as Customer Service 101, Managing for Excellent Customer Services, Telephone Etiquette, and Handling Difficult Situations. LSSI also supports ongoing staff development, including attendance at local, state, regional and national library association events, and provides a tuition reimbursement option to employees for qualified job-related college courses. All library staff members employed to perform the library services specified in the subject RFP will be LSSI employees, and LSSI will pay all costs related to their employment, including employee benefits.
LSSI will train all library staff members responsible for handling cash receipts in the County and/or City cash handling procedures, and will monitor their work to ensure adherence to these procedures.

LSSI will interview all former Stockton-San Joaquin County Public Library employees who were laid off during the current fiscal year due to budget concerns, as well as all current library employees. Both groups will receive preference from LSSI when competing for positions within the new staffing structure.

LSSI has provided a description of its overall Staffing Plan in Section 2.3.5 for the three scenarios described in the RFP: operate a combined Stockton-San Joaquin Public Library System, operate a separate San Joaquin County Public Library System, and operate a separate Stockton Public Library System.

1.3 Hours of Operation

LSSI will staff and operate the Libraries on a schedule approved by the County Board of Supervisors and/or City Council. A detailed description of LSSI’s proposed hours of operation for the Libraries is included in the Operational Plan (Section 2.3.4) and Cost Proposals (Section 2.5). LSSI has assumed that initially the hours open will be the same as those hours currently scheduled; however, during the first six months of the contract, we will analyze the use patterns for each of the library branches and make recommendations for changes to the operating hours to better match the needs of the citizens of Stockton and/or San Joaquin County.

1.4 Circulating and Reference Materials

Research suggests that the two most important predictors of library customer satisfaction are the availability of items wanted and the helpfulness of library staff. In consultation with public officials, LSSI will build a collection that is responsive to the needs of the community, current and authoritative, and available in appropriate formats. LSSI will create a Collection Development Plan for the library, with numeric goals for materials in each sub-collection.

LSSI’s Collection Management Team will review the existing collections in each of the libraries to assess the age, condition, and subject relevancy for community needs. This review will use data such as historical circulation and collection usage statistics, and basic demographic data about the community. Where available, LSSI will also review non-library data, such as data pinpointing local trends. LSSI will also use interlibrary loan request data and other indicators of the types of materials not currently held by the library but in demand by the community. LSSI will use this data to update the definition of the “ideal” collection for the County and/or the City and will assess the collection against that portrayal.

LSSI will create a comprehensive Collection Development and Management Plan. The Plan will include:
• A Short-Term Collection Development Plan recommending remedial action necessary to adjust the current collections to better meet community needs and cost estimates associated with any needed additions to the collection.

• A Long-Term Collection Development Plan describing the types and quantities of books, electronic resources, and other materials the library should be purchasing to meet community needs. This Plan will be presented as a prioritized, three-year purchasing program to ensure that the library’s resources are used effectively and the collection grows in a systematic and global way. It will include a program to systematically evaluate and replace outdated material, as well as an analysis of the correct proportions of the library’s collection for print, non-print and electronic resources based on the demand for and usage of each type of material. LSSI will ensure that the Plan is realistic within the County’s and/or City’s anticipated future financial resources.

• A Discard Plan to systematically weed and replace obsolete, dated, and/or damaged materials in the collection. LSSI will weed the collection only with the approval of public officials.

Guided by the provisions of the Collection Development Plans (both short-term and long-term), LSSI will purchase materials on behalf of the County and/or City. LSSI currently spends more than $6M a year on books and other materials for the 63 libraries we operate; our combined purchasing volume commands the highest available discounts from vendors for both materials and processing costs, higher than a single library could obtain on its own. Also, because we manage so many libraries and collections, LSSI has a dedicated Collection Management Team staffed with experienced collection management specialists who are available to assist the local library staff with routine tasks like order placement and tracking, and collection weeding. This Team’s expertise will also be tapped during the crafting of the Collection Development Plan so that needed acquisitions can be planned in advance to take advantage of volume discounts.

1.5 Planning and Performance Monitoring

LSSI will begin a short-term and long-term planning process immediately after contract award because the results of this process will guide the establishment of the Libraries’ goals and objectives. LSSI’s fundamental objective is always to provide the best and most cost-effective library service possible in each of the communities we serve; however, defining what is ‘best’ for a particular community is not always easy. Consequently, our first objective in administering the Library System will be to benchmark critical library success indicators such as circulation, number of visits to the library, program attendance, availability of materials, and efficiency indicators such as operating cost per hour, cost per circulation, and cost per square foot. LSSI will work with public officials and other library stakeholders identified by the County and/or City to establish clearly defined goals for each of these indicators, as well as measurable milestones towards their accomplishment. The library staff will track progress toward these goals through the use of statistics, and will focus on improving library services and library usage by the community on a continuing basis.
LSSI will coordinate with the County and/or City to ensure that the definition and wording of the libraries’ goals clearly correspond to any relevant goals already articulated in the County and/or City’s Plan and budgets, following the protocols, procedures and calendar used by the County and/or City.

The Libraries’ goals and Plans will be revisited and adjusted at least annually on a schedule that works best for the County and/or City. A community’s needs are never static; they continually evolve with changing information needs and shifting demographics. LSSI’s library staff will routinely monitor all available sources of data about the libraries’ communities and will collaborate with officials to define adjustments to the services we provide to keep up with the communities’ needs. LSSI will use library statistics in conjunction with information gained through other community sources to chart a course for library services for Stockton and San Joaquin County. LSSI will also review the Library’s policies and procedures on an annual basis, and make recommendations for any needed changes to the County and/or City.

LSSI will carefully, consistently, and accurately collect all core library performance measures and use statistics required by the California State Library Public Library Statistics, and will ensure that this data is submitted to the State Library in a timely fashion each year. We understand that the data required by the State Library will be the minimum reporting requirements, and will provide additional detailed information for the County and the City. Benchmarks for goals and outcomes for the library system are further detailed in Section 2.3.7.

### 1.6 Budget and Finance

#### Fines and Fees

Establishing policies regarding the collection of library fees and fines will remain the prerogative of the County and/or City. However, LSSI will consult with public officials and the library staff regarding the setting of fines and fees, and, if desired, will provide recommendations for these policies based on an analysis of the Library’s current policies compared with the policies in effect at neighboring libraries. After the fine and fee schedule has been approved as library policy by the County Board of Supervisors and/or City Council, LSSI will propose a set of procedures that will guide the library staff in the collection of the approved charges. Fine and fee policies and procedures will address the issues of a grace period for overdue items, overdue notifications, fee-based services, collection and payment of fines, and resolving user problems or protests of fees.

#### Revenues

All revenues from fines and fees will be coded to appropriate cost centers to allow these revenues to be tracked accurately by the County and/or City. Deposits will be made in the manner dictated by officials, either into a County and/or City account or into an LSSI account payable to the County and/or City. LSSI will establish cash management procedures to ensure that a minimum amount of cash is on hand in the library at any one time, and that all deposits are handled in a timely and accurate way.
Periodic Financial Statements
In all contracts, LSSI maintains detailed financial records and employs standard accounting practices to ensure scrupulous internal control of, and full accountability for, client resources. All payables and payroll will be managed via accounting software that ensures adherence to strict federal government contract standards. All invoices will be coded to appropriate accounts and logged into the accounting system, with checks issued from LSSI’s Germantown, MD office, with the exception of smaller invoices that are paid out of LSSI’s West Coast office in Riverside, CA to ensure faster turnaround. All employees will maintain semi-monthly timesheets that record hours worked and allocate time according to project cost centers. Reports specific to each of the library facilities will be supplied to the County and/or City at monthly, quarterly, semi-annual and annual intervals and upon demand at any time. As with all LSSI contracts, all financial records pertaining to this contract will be organized and retained at our corporate headquarters, and will be fully auditable at any time. Annual audited financial statements will be provided to the County and/or City as a demonstration of LSSI’s continuing financial stability. In addition, LSSI will coordinate with public officials to ensure that the timing of these reports facilitates their use in the County and/or City’s preparation of their annual budgets.

Alternative Revenue Sources
Traditional sources of library revenue such as taxes and bonds may not meet current and future library operating costs. LSSI has aggressively sought a variety of alternative revenue sources including grants, foundation funds, research funds, and property mitigation fees. Our library staff members in Riverside County, for example, have successfully written, received and implemented more than $3.5M in grants to support literacy programs for adults and children, teen reading programs, and tutoring and outreach programs for Latino residents. Additional grants have been awarded to other LSSI libraries to support new library construction, collection development, marketing and outreach.

The pursuit and acquisition of grants has greatly expanded the ability of LSSI-administered libraries to provide additional services to their communities. LSSI brings this extensive experience in grant writing and implementation to the Stockton-San Joaquin County Public Library System, and will work with the State Library of California as well as with Federal and other sources to win grant funding for programs and resources of interest to the County and/or City. All grant applications will be coordinated by LSSI with San Joaquin County and/or the City of Stockton.

LSSI is a leader in the movement to re-think how libraries are funded, and to explore ways in which we can help stabilize and enhance library funding by adapting the diversified funding strategies successfully used by other non-profit institutions. Public libraries have traditionally depended on local and state tax revenue for more than 90% of their funding. Other non-profit organizations long ago learned how to diversify their revenue stream so they are not too reliant on any one source of funds.

LSSI and several public libraries commissioned a study on alternative and supplemental funding strategies urging adoption of a plural funding strategy “that unites public funds and private
philanthropy in a partnership to provide excellence in America’s public libraries.” LSSI has experimented with specific recommendations from the study in libraries across the US.

LSSI’s Management Team will use the knowledge and experience gained about alternative funding strategies to analyze supplemental revenue sources for library funding in San Joaquin County. All potential sources of supplemental library revenue will be considered, including:

- Partnerships with local bookstores, cafes, retailers and service companies that might share space in the library in exchange for rent and/or a share of the proceeds.
- Corporate and organizational sponsorships and underwriting of library resources and programming.
- Annual Fund Drive for the library along with planned giving and earned income programs.
- Book-based donation programs.

Results of this analysis will be reported in a Supplemental Funding Report and Recommendations. This Report will estimate the revenue potential from implementing each of these options; estimate the costs to implement and manage each initiative; and evaluate the risk involved with each venture. LSSI will also identify potential sources of start-up funds and/or commercial partnerships that could help minimize or eliminate initial investment costs to the library. The Report will be presented to the County and/or City within six (6) months of the start of the contract, and LSSI will implement any recommendations approved by the officials immediately thereafter.

LSSI currently handles the federal E-Rate applications and submissions for each of the public libraries we operate. We submit all required paperwork as quickly as possible to ensure prompt reimbursement for the communities we serve.

All revenues resulting from Library operations and programs are the property of the County and/or City; LSSI understands that it is the intent of the County and/or City to try to maximize library revenues, and that revenue sharing and incentive programs may be explored as an avenue to achieving better financial results.

### 1.7 Facilities and Equipment

LSSI understands from the RFP that the County, City or Host Community will be financially responsible for any capital improvements to Library facilities. If there are major projects or upgrades which involve Library buildings, grounds, building systems, utilities, landscaping, HVAC systems, or lighting, the County, City or Host Community will likewise be financially responsible.

The RFP distinguishes between major projects or upgrades and routine facility maintenance, including such tasks as landscaping, phone, garbage, pest control, fire extinguisher, alarm, electric, gas, water, sewer, and janitorial services. In our Cost Proposal volume, LSSI has included the cost for these expenses for two of the eight County libraries, as described in Attachment B. We understand that the Host Communities will be financially responsible for the
cost and payment of this type of routine operating expense for the remaining eleven library locations.

At all times, LSSI’s staff members will follow best practices and all County and City guidelines on energy usage in order to conserve energy and control utility costs for the Host Communities.

LSSI understands that the County and City may administer all leases for Library facilities. The Library Summary Information provided in the Background statement of the RFP lists only the Linden Branch as a leased facility. In our Cost Proposal volume, LSSI has included the cost for this lease as described in Attachment B to the RFP, and we will pay this lease payment as specified by the County.

### 1.8 Systems

The type of contract resulting from this proposal effort will play a large role in the continuing provision of library automation services to both San Joaquin County and the City of Stockton. Because the City is currently responsible for providing automation services, hardware and software to all branches of the current City-County Library System, if the County and the City award a joint contract to LSSI for both County and City library operations, the City will most likely continue to provide these services and equipment to both the City and County libraries. However, there are also several other possible contractual outcomes:

- Two separate library operations and administrations contracts, one with the City and one with the County
- A City-only library operations and administrations contract
- A County-only library operations and administration contract

If two separate library operations contracts are issued, both with LSSI, LSSI will coordinate library automation services using the existing library system infrastructure. Each party will contribute an equitable amount to the costs of operating the library systems, based on system usage and other factors, as agreed upon by the County and the City.

If only the City of Stockton issues a library operations contract with LSSI, the City owns the current library ILS and all of the library equipment required to continue library automation operations with no interruption in services. If the City so chooses, they could continue to offer library automation services to the County under this arrangement; otherwise, the County would need to procure these services elsewhere.

If San Joaquin County negotiates a library management contract with LSSI separate from any action taken by the City of Stockton, several options may be available for handling library automation services. It is our understanding from the RFP that the current Sirsi Symphony library system and all the computers in the libraries belong to the City of Stockton. This includes the central site hardware that supports Symphony, and all computer equipment used for daily operations of County Libraries. The County would have the following options to continue library automation services under this scenario, prioritized by LSSI’s preference of approach.
Option 1: Negotiate with the City of Stockton to continue to provide central site ILS services and equipment, and the computers used in daily library operations

LSSI recommends that the County negotiate with the City to secure on-going services and ensure no disruption in the automation services and equipment provided to the County Libraries and their customers. This approach has many advantages; library users would retain their current library cards, materials owned throughout the system would continue to be available system-wide, and customers would experience no disruption to collection access or inventory control.

If the City is amenable to continuing to provide these services and equipment, LSSI and the County will need to negotiate a reasonable cost for these services with the City. If the City is not willing to continue to provide these services, or will not provide them at a cost which is acceptable to the County, LSSI recommends that the County consider Option 2 or 3 to replace the central site services and hardware.

Under Option 1, whether or not the County reaches a satisfactory agreement with the City of Stockton about the continued provision of ILS central site services, the County could approach the City separately about purchasing the existing computers used in daily library operations at their current value (after depreciation).

Option 2: Use the $400,000 remaining fund balance to replace the Symphony system and the County computer workstations for the public and library staff

Under this option, the County would replace the City’s Sirsi Symphony system with a new integrated library system selected after an open procurement process to best meet the needs of the County Libraries and their customers. Should the County so choose, LSSI will work with officials to draft an RFP for a new library system, and assist with the competition process to determine the best library system for San Joaquin County libraries for the future. In 2009, LSSI completed an extensive RFP process to procure a new system to replace a Horizon ILS for the Finney County (KS) Library System. Polaris was selected as the winning vendor after a rigorous competition; the new system was successfully implemented by LSSI’s staff in less than a month. LSSI is familiar with the creation of detailed specifications and requirements for integrated library systems, and has developed a pool of vendors who supply such systems. LSSI has also investigated alternative systems, including open-source alternatives.

If the County does not want to acquire a new ILS, Option 3 provides another alternative to the central site system; however, new computers for daily library operations would still be necessary to continue library functions. LSSI recommends that these computers be purchased using the remaining fund balance. Because of the many computers LSSI purchases for its 63 library sites, we have negotiated excellent purchase agreements with various computer hardware suppliers. LSSI would ensure that San Joaquin County receives our most deeply discounted rates if the County elects to purchase new computers through LSSI.
Option 3: **Seek membership for San Joaquin County in the Inland Library Network** to replace the current City-provided central site functions and services

As another possible cost-effective alternative, LSSI encourages San Joaquin County officials to consider becoming part of the existing Inland Library System, which includes Riverside County Library System, as well as the San Bernardino County, Victorville, Murrieta, Moreno Valley, College of the Desert, and Inyo County Libraries. These libraries use a shared ILS (currently the same Sirsi Symphony system used by Stockton-San Joaquin) and through their combined library catalog database provide access to more than four million books as well as magazines, newspapers, and other materials. All library card holders in any of the libraries participating in the system can borrow items from the other libraries. A courier service maintained by LSSI provides quick delivery for borrowed items among the current network participants. Although the location of San Joaquin County would prohibit the delivery of materials by courier, if the County is interested in participating in the network, it is possible that other lending and delivery arrangements could be arranged to increase the value of the cooperation between partners.

If San Joaquin County would like to participate in the Inland Library System, and Inland’s current member libraries approve the addition of the San Joaquin County Public Library System, the County’s catalog records could be quickly and easily uploaded from the City’s Symphony system to the Inland Library System’s Symphony system. Because the systems are the same, the catalog will be familiar to the library’s customers, with no need for explanations. Participation in the Inland Library Network would also move the responsibility for system maintenance from County Library staff to LSSI’s Riverside County Library IT staff.

As mentioned above in Option 2, this approach replaces only the central site system; it does not replace the computers used in daily library operations at each of the County libraries. These computers would still have to be purchased by the County, either from the City or on the open market. As mentioned above, LSSI suggests that this expense would be a possible use for some of the $400,000 remaining fund balance.

The County and/or City have asked each proposer to describe its approach to several different automation needs, as follows:

- **Library card issuance**: LSSI has been responsible for the implementation of several new library automation systems during the transition phase of its library administration contracts. In cases where a community was withdrawing from previous networks, the issuance of new library cards for all users was often required. LSSI has a professional graphic artist on staff who has designed new library cards for most LSSI-administered libraries; for Jackson County, Oregon she designed three separate library cards so that library customers could choose their favorite design, which has proven to be a very popular option. Any proposed library card designs will be submitted to the County and/or City for approval before any cards are ordered. LSSI has established good contacts with several library card vendors, and can provide cards cost-effectively with minimal turnaround times.
If the County and City both contract for library services, and maintain the current automation system jointly, there should be little immediate need for a change to the existing library cards. However, if there is a change and the two jurisdictions no longer share a system or permit access to each other’s library materials, new library cards should be purchased and distributed quickly to clearly differentiate membership in each library system, eliminating confusion for library customers. During contract transition periods, LSSI has frequently organized full-scale library card issuance and replacement activities, pre-registering as many library users as possible before opening day. On-site registration can be expedited through the entry of skeletal information into the automated system; the information captured is sufficient to issue a library card and check out items to the customer. Complete data can later be added to the patron records from the completed library card application forms as time permits. We are aware that communities have differing requirements for the issuance of library cards; our staff members will be instructed to carefully adhere to any proof-of-residency requirements imposed by the County and/or City, and to issue library cards only when all conditions have been satisfactorily met. If Library policies are to charge for issuing library cards to non-residents or guests, LSSI’s staff will follow these policies, and collect the appropriate funds before issuing cards to these customers.

- **Financials:** LSSI interprets this requirement to be a request for financial reports, detailing transactions by library customers that result in money being paid to the library. These transactions include the payment of fines and fees, payments for copying and printing, and other payments, including cash collected by library staff for Friends of the Library book sales, meeting room rentals, the sale of incidentals like blank CDs and headphones, and any special program charges. LSSI proposes that the County and/or City implement a library cash management system, which together with the library’s automation system will automatically track most cash collected by the library. A library cash management system provides a mechanism for library customers to pay fines and fees, either in person or remotely over the internet, using credit cards. When payments are received by a cash management system (such as Envisionware’s eCommerce services), the payment information is automatically transmitted to the library’s automation system, clearing the customer’s record of the fines that have been paid. The Library’s Sirsi Symphony system prints reports detailing the Library’s financial transactions; this reporting capability interfaces with library cash management systems, and the resulting reports will include both those payments made in person using cash, as well as those made online using credit cards. LSSI is implementing eCommerce with Sirsi Symphony in Riverside County, and the reports produced from Symphony have been approved for use by city auditors in at least one city in the County. The Symphony reports are detailed enough to show any fine amounts which were waived by library staff members, as well as the actual cash collected. The reports can also show uncollected fines still outstanding, as well as items damaged or missing from the collection.

- **Access to Internet:** Free public Internet access for all library customers will be maintained by LSSI. LSSI will consult with County and/or City officials and staff regarding the feasibility of adding new services, such as voice-over-internet protocol (VOIP) services and video teleconferencing, and will deploy these services as approved and appropriate. LSSI’s technical staff will assist with the configuration of local public Internet access. As discussed
elsewhere, LSSI recommends the use of PC scheduling and monitoring software such as Envisionware that will allow the public to make their own computer reservations and ensure the consistent application of policies governing Internet use. LSSI will work with the County and/or City to develop an Internet policy, including proposing alternate policies, advising on the pros and cons of each proposed policy, and, once adopted, ensuring that all policies are carefully adhered to in a fair and consistent manner. Assisted by LSSI’s automation staff in Riverside, CA, the local IT staff will also maintain each library’s computer equipment, as well as its telephone and data networking infrastructure. This staff will also complete all E-Rate application forms in a timely manner in order to receive the maximum possible refunds for service.

- **Access to electronic databases**: LSSI will review the electronic databases the Library currently subscribes to, and the way that access to these databases is provided and controlled. Typically, some databases are accessible only to in-library customers (like the premier genealogy database, Ancestry.com), while others can be accessed by library customers at home over the internet, using their library card numbers as authorization codes. LSSI will continue to make available whatever electronic databases are currently accessible. In addition, we will research other databases which might be useful to library customers, including databases which can be provided cost-effectively through library networks and other cooperative library organizations.

- **Filters**: LSSI understands that the Library currently has controls added to their Wi-Fi service provided in each of the libraries that restrict access to potentially questionable websites. The issue of filtering internet access is typically addressed by a library policy. While LSSI can suggest wording for such a policy and knowledgeably discuss the pros and cons of various filtering policies and strategies based on experience gained in working with filters in various public libraries across the nation, the ultimate policy formulation rests with the County and/or City officials. LSSI’s staff will implement whatever filtering policy is adopted and make sure that it is applied consistently in all library locations.

- **Public access online catalog, circulation, acquisition, cataloging modules**: These modules are all included as parts of the Library’s current Sirsi Symphony integrated library system (ILS), and would also be included in any upgrades to or replacements for this system. LSSI employs experienced library operations and IT staff members who have been trained by Sirsi in how to optimize the usefulness of the Symphony system, and how to best work with each of these functional modules. Several LSSI IT staff members have received Sirsi’s systems administrator training, and are also certified network engineers. LSSI is proposing to hire an Automation Manager and two Automation Technicians to ensure the efficient and effective use of the Library’s ILS to provide circulation, acquisitions, cataloging and public access functions to the Library’s customers.

- **Other systems LSSI has used effectively in public libraries**: LSSI will review possible technology upgrades which would result in an enhanced customer experience and, in many cases, would also free staff time for more face-to-face interaction with customers. Technology can quickly and accurately handle low-level, mundane library tasks (like item
check-outs), while library staff members complete higher-level, customer-oriented tasks. Some possible technology upgrades for consideration by the County and/or City might include:

- **Networked printers**: If not already installed in each library, LSSI recommends implementing networked printers to provide printing from the library’s public access computers to a central location in the library. Networked printer systems such as those offered by Pharos can be set up to print only after a user pays for the copies to be printed; this controlled printing eliminates the possibility of customers printing stacks of paper and then not claiming or paying for the printed copies, wasting the library’s paper and ink. It also helps people make fewer printing mistakes, reducing the amount of paper tossed into recycling bins or trash cans. In addition, it gives customers 100% confidence that what they print won’t be seen by anyone until it reaches their hands. Networked printers reduce to a minimum the amount of staff time required to manage the library computer printing function, because the printer can be located at the service desk for the library, providing a convenient location for customer payments as well as for printer maintenance tasks such as replenishing ink and paper. Such systems are a good idea for almost every library.

- **Computer scheduling**: If not already present in each of the libraries, LSSI recommends installing a computer management system such as Envisionware to manage public access to the Internet, including reservations, sign-on and sign-off. These functions, which are handled manually by staff in many libraries, consume staff time and often result in customer frustration and complaints. Computer management systems allow customers to reserve computers themselves, and automatically sign new users onto the computer and sign old users off when their sessions have been completed. Most systems also restore library-established computer defaults at the conclusion of each user session, erasing any information entered or viewed by the previous user, and ensuring that no objectionable or private information remains to be seen by the next user.

- **Cash management system**: If each library does not already have a cash management system installed, LSSI recommends that such a system be implemented. Cash management systems interface directly with the library’s integrated library system to allow library customers to pay any fines and fees either remotely or in the library using their credit cards. These systems also let customers manage balances and credits on their library accounts. In addition, such systems save library staff time, eliminate staff handling of money, ensure accurate transactions, and provide a clear audit trail. These systems can also interface with the

Self check-out station in Redding, CA is designed for ease of use by customers.
networked printing function, automating the cash collection for printing as well.

- **Radio Frequency Identification (RFID) technology**: The libraries are currently using barcode technology rather than RFID technology to manage the materials inventory function. To provide more efficient charge, discharge, and self-charge functions for library customers, LSSI recommends that costs to implement such a system be investigated. RFID systems rely on the installation of a small RFID “tag” in each item in a library’s collection. This tag transmits a radio signal which can be used to inventory the collection, and to work with RFID scanners to automatically check books out. The RFID tags are so effective that users can place a stack of several items on a self-check machine, and the machine will automatically check each item out to the patron’s library card. RFID is just as effective at checking materials back in to the collection, showing that the item has been returned by the customer and is ready to be circulated. RFID tags also work with library security systems, sounding an alarm if a customer leaves the library with items which have not been checked out properly. Their accuracy ensures a higher level of customer satisfaction, and fewer customer complaints about materials which have been returned to the library but incorrectly checked back in to the collection, resulting in the assessment of erroneous fines.

- **Self-check technology**: Along with RFID technology, LSSI recommends that the library consider more self-check stations for customers, and the enhancement of existing stations with newer technology. The library’s self-check terminals are currently using barcode-based technology to perform check-outs for customers, which means that each item must be checked out individually, one by one, a time-consuming process when a customer has many items to check out. As described above, RFID tags permit multiple items to be checked out at once, greatly speeding the self-check process. Self-check stations using barcodes are also more difficult to use; the proper barcode position under the scanner is critical to ensure that it can be read. RFID technology instead relies on transmitting a signal, and doesn’t require the customer to open the cover of the item, or to precisely position the item.

As mentioned elsewhere, LSSI will also consult with County and/or City officials and staff regarding the feasibility of adding new library services, such as Voice-Over-Internet Protocol (VOIP) and video teleconferencing. Before making any recommendations for the acquisition of new or improved library technology, LSSI will analyze the Library’s existing technology, and will present a proposed implementation plan for review by the County and/or City, including the estimated costs, proposed implementation steps and the timing for any approved changes.

LSSI will maintain the library’s website, and will ensure that users have access through the website to the library’s online catalog, online full-text databases, customer account information, and the library’s online calendar of events, as well as to other pertinent library information. LSSI has just unveiled a new Web 2.0 website for Riverside County customers and will investigate the advantages of introducing a similar new website in Stockton-San Joaquin.
LSSI will also maintain the library’s computer equipment, including the acquisition of any new servers/hardware required.

We understand that should the County issue a separate contract, LSSI will be responsible for acquiring a copy of the County’s current cataloging data from the City of Stockton, and for uploading this data accurately into whatever ILS system the County chooses to replace the City’s Symphony system. LSSI has extensive experience with the formatting of cataloging data from one library system to another; we have a separate division which routinely provides these services to all of the leading library system vendors on a contractual basis, and will use these services to ensure that the data transfer is handled efficiently and effectively for the County, within a minimal amount of time. We have handled similar data transfers in our library administration contracts in Germantown, Collierville, Arlington, and Millington, Tennessee; Leander, Texas; and Finney County, Kansas.

LSSI will also manage the Library’s telephone and data networking infrastructure, with a goal of zero downtime, and the provision of support during all library open hours. In addition, LSSI will complete all E-rate application forms in order to receive the maximum possible refunds.

LSSI has many resources to support the library’s automation and technology program through our experienced information technology staff located in Riverside, CA and elsewhere in the US. The Stockton-San Joaquin County Public Library System currently uses the Sirsi/Dynix Symphony ILS to provide system-wide library automation capabilities. LSSI has worked extensively with the Symphony system, which replaced the Sirsi Unicorn system. Of the thirteen library automation systems managed and operated by LSSI today, six use Sirsi Unicorn or Symphony. The remaining libraries use a variety of automation systems: one library uses the Horizon system, three current clients use TLC’s Library.Solution ILS, one has Innovative Interfaces INNOPAC (which is now Millennium), and two have Polaris systems.

LSSI has developed an in-depth knowledge of all of these current ILS systems, and has trained IT staff members who have established contacts with each system vendor’s IT support staff. In addition, LSSI has worked closely with many of these ILS vendors on database formatting projects when new customers have needed to upload their existing catalog databases into a new system. As mentioned above, LSSI has a separate division which provides data extraction, normalization, authority control, and uploading services to automation system vendors, and has developed good working relationships with each of these companies.

As described more fully in Section 2.3.6, LSSI’s IT staff will work with County and/or City officials to build a Technology Plan to analyze the Library’s current systems and pinpoint needed future enhancements or upgrades to the existing technology. This Plan will include an approach to the systematic replacement of computer equipment. LSSI understands that the Library’s ILS, which includes circulation, online catalog, and acquisition modules, will require upgrades during the course of the contract. As necessary, LSSI will negotiate on behalf of the County and/or City to acquire any necessary Symphony system upgrades from Sirsi/Dynix, and will analyze the capabilities of other available ILS options that can provide a more intuitive customer interface, improved systems support, and reduced costs for maintenance and other system expenses.
1.9 **Library Services and Programs**

LSSI will ensure that the level of services provided to the citizens of County and/or City will be at least equal to that currently being provided by the Library. LSSI will maintain all of the Library’s current interlibrary loan agreements, and in addition will investigate other possible interlibrary loan arrangements. In the administration of the County and/or City Library System, LSSI will comply with all California laws and regulations governing the provision of public library services, including, but not limited to, the California Library Services Act.

LSSI will work to enhance the existing level of services, based on our experience gained through our current operation of 63 libraries throughout the US. Developing a series of successful and well-attended programs that appeal to all age groups is an essential element of library operations. The role of the library in its community has shifted from being primarily a warehouse of books to becoming a destination for citizens to come together to learn, be entertained, and engage one another around topics and activities of broad social interest. Increasingly libraries find themselves competing with bookstores, local movie theaters, museums, and the mall or shopping center as a place to spend precious leisure time. By hosting exciting and informative programs, libraries can pull more users into the library, providing an opportunity to dazzle them with the array of library resources available for free. Thoughtfully developed programming — especially for children and teens — helps to establish the library as a partner in the intellectual development of children and youth, ensures their success in school and later life, and builds the long-term viability of the institution of the public library.

LSSI has a significant, demonstrable track record in providing excellent programming for children, adults, teens, the underserved, rurally isolated, and those in need of literacy and English-language instruction. In Riverside County, LSSI’s staff provides daily programming to all of these groups, including a robust countywide literacy and ESL program. (An indication of the range of programming offered in Riverside County can be seen on the RCLS online calendar available on its web site at www.rivlib.net). Among these programs is an outstanding Latino outreach program - called “Leer Es Triunfar – Reading is Succeeding” - that has brought thousands of new residents into the library and has had a profound effect on the type and variety of programming offered in Riverside County since 2003. In 2005, this program won the prestigious John Cotton Dana Award for library public relations campaigns awarded by the American Library Association’s Library Administration and Management Association. LSSI’s staff in Riverside County has also taken a lead role in the state of California in promoting Día de los Niños/Día de los Libros (Day of the Child/Day of the Book), an annual...
celebration of books and reading for all children with an emphasis on multicultural and bilingual children. Riverside County staff sought and obtained LSTA grant funding from the California State Library to plan for a statewide celebration of this event that resulted in the adoption of Día de los Niños/Día de los Libros as a project of the California State Library. The Riverside County Library won the Raúl and Estela Mora Award from Reforma in 2008 for its work in promoting Día in Riverside County and in the state of California.

LSSI has also been very successful in developing programs to draw teens into the library. In Finney County, Kansas, LSSI established a Teen Advisory Board to solicit on-going input from teens themselves about programs of interest and additional library services needed. In Germantown, Tennessee, LSSI has begun an extensive anime program, including anime screenings, presentations and demonstrations by anime artists, and the establishment of an anime discussion group. Anime attracts a different segment of the teen population from some more traditional library programs. The anime program was primarily funded through grants received by LSSI for this purpose. LSSI will solicit input from teens in San Joaquin County to determine the level of interest in various types of young adult programs. We recommend that a Teen Advisory Council be established as quickly as possible to facilitate this type of dialogue.

LSSI’s staff members, particularly in Riverside County and in Jackson County, Oregon, have taken a lead position in developing stimulating and challenging programming for adults. In Riverside County, LSSI’s staff developed cultural programming series countywide and in individual libraries that have both significantly increased attendance at library programs and have brought statewide attention to the library system. Last year, for example, a series of cultural programs brought thousands of adult participants to the library for author talks, musical programs, lectures, and performances, most of which had a strongly multicultural component consistent with the interests of the communities served. Due to this ever-increasing emphasis on programming, attendance at library events in Riverside County over the past two years has increased more than 88% from 67,862 in 2006-07 to 127,717 in 2008-09.

The Riverside County Library System’s reputation for high quality adult programming led directly to an offer from the California Council for the Humanities to make Riverside County the only participant in a State Library-funded program called “Making A Difference.” The Council is funding 18 programs in six county libraries. Each program has been carefully designed to encourage individuals in the communities to come together in the library to engage in civic dialogues around topics of importance; the first program was a discussion of the civic protest. The California Council for the Humanities and a partner, the Project for Civic Reflection, seek to demonstrate that public libraries are the proper and logical venue for the public to meet for stimulating discussions of these topics.

In Jackson County, Oregon, LSSI’s staff has created highly engaging series of programs that have brought adults and young adults into the libraries to participate in county-wide reading programs, hear lecture series, join writing groups, and listen to readings by noted poets and authors.
Library services for seniors typically focus on making access to information and resources easier for members of this population, who may have physical infirmities, a lack of familiarity with available technology, and limited transportation options. A current and frequently changing collection of large print and audio books helps to ensure library usage by seniors. At several of our libraries, LSSI’s staff teaches courses in beginning computer technology, geared specifically toward older users; the demand for these classes sometimes outstrips the available resources. Some of these classes have been totally grant funded. In Collierville, Tennessee, an AARP Driver Safety program for seniors 55 and older provides a certificate of completion to all participants that can be used to obtain discounts on car insurance. AARP also provides free in-library tax preparation services for seniors in several of LSSI’s Tennessee libraries.

Another aspect of library services is outreach. LSSI’s Riverside County Library staff provides coordinated outreach in several ways, including the development of specialized programming such as author talks, programs for Latino families, services for shut-ins, off-site services and programs, and the operation of two bookmobiles reaching rurally isolated regions of the county. In Jackson County, Oregon and Germantown, Tennessee, outreach staff have established regular schedules for visits to area long term care and assisted living facilities. During the transition period, LSSI’s Transition Coordinator will meet with the staff of various local facilities to determine a feasible level of service and a schedule for providing these services to residents.

The provision of outstanding children’s programs will be critical to increasing the use of the library by the community. LSSI will analyze the children’s programs currently being provided, comparing the number and types of programs currently offered with successful programs located elsewhere. A senior-level LSSI Children’s Librarian will conduct this evaluation, and will carefully consider demographic information about the community to create exciting new children’s programs and establish a workable schedule for presenting these programs. It is important to consider the work schedules of parents in the community to ensure that programs are presented at times when parents can easily bring their children to the library. Successful children’s programs at other LSSI-managed libraries include pajama storytimes, wacky Wednesdays, lap-sit storytimes, and family interactive story-times. All of these are program series, with interrelated themes each week. Puppet shows and crafts classes add variety for older children. Many LSSI libraries also use the popular technique of having children read to dogs (called “Paws to Read” in the Riverside County Library).

In addition to developing creative new programs, using ingenuity in marketing these programs to ensure the widest possible audience will be critical to success. The citizens of San Joaquin County have a wide variety of entertainment options from which to choose; it will be important that the Library distinguish itself from other offerings by stressing the educational and informational value of its programs to the community.

### 1.10 Community Relations

LSSI pursues community involvement in all of our library sites. Depending on the demographics of the community, our outreach and collaboration can involve local senior citizens groups, families home-schooling their children, nearby daycare centers, important and active clubs such
as genealogy groups, and other parts of the community that would benefit from—and contribute to—robust library services and programming.

Some of our successful community partnerships have been with daycare facilities and other caregivers for pre-schoolers, including establishing story times, creating special contests, showing movies, and proactively lending materials. One outreach example is our provision of more than 100 specially selected books that each pre-schooler in Riverside can take home. We serve more than 2,000 children each year in this way. Similarly, in Jackson County, Oregon, our outreach staff members pack canvas bags with appropriate materials and deliver them to local daycare centers, offering a welcome surprise and new set of activities for both teachers and children on a regular monthly basis.

At the other end of the age spectrum, we have also enjoyed exciting program time with senior citizens through partnerships with the local groups that serve them, including AARP and genealogy groups. In Collierville, Tennessee, for several years we have operated a very popular AARP driver safety program for seniors 55 and older. After completing the program, each participant receives a certificate of completion which he or she can use for discounts on auto insurance. Another AARP program provides income tax preparation services free of charge for library users. Our libraries have also organized regular visits to long-term care facilities in their areas and other outreach efforts to keep older residents engaged and served by their local library. In Jackson County, Oregon, a professional Outreach Coordinator facilitates the efforts of volunteers providing one-on-one reader’s advisory services to community members who are home-bound. Through structured phone calls, they learn enough about each customer’s reading preferences to be able to suggest new book selections on a regular basis.

Joint-use facilities provide another way for LSSI to help communities get the optimal amount of use from local resources. In Riverside County, California, LSSI operates six joint-use library facilities shared with local school districts. Using these community-provided facilities as a central location for both educational and leisure services means that they are open for a greater number of hours each day and more days each week, providing additional benefits to each community at little additional cost.

These are isolated examples of LSSI’s approach to community outreach. After consultation with public officials and a review of available information about citizens’ needs, we will draw on these and other experiences to design efforts appropriate to the County and/or City. LSSI is proposing to hire a full-time professional Outreach Coordinator for the Library, ensuring that this important function is adequately staffed and managed.
Mark Smith, LSSI’s Vice President of Public Library Operations, will serve as LSSI’s management representative and liaison to the various Friends of the Library organizations. LSSI’s staff members maintain healthy, cordial relationships with the Friends groups in all of our contract sites. Participation in Friends groups has often increased at libraries managed by LSSI, and we value the input and insights of the Friends into library operations, new initiatives, and library support, both financial and in the form of volunteer hours and activities.

LSSI has occasionally established other advisory groups to augment the work of the Friends, and to engage persons who might not otherwise be active at the library. For example, teens represent one of the most frequently underserved groups in public libraries. To gain a better understanding of the information and resource needs of teens, several LSSI libraries have created “Teen Advisory Groups.” These groups bring local teens together to discuss the kinds of information and resources teens need and would use most, gather suggestions for library materials to purchase, and discuss ways to attract more teens to the library. LSSI will recommend the formation of similar advisory groups for the San Joaquin and/or Stockton libraries if officials feel that such groups would be beneficial.

LSSI will develop a Marketing Plan to promote all existing and new library services to the citizens of the County and/or City, and will implement the Plan subject to approval by the County and/or City. A detailed description of potential marketing efforts can be found in the Potential Marketing Plan, Section 2.3.11.

LSSI understands that general supervision of Library operations, including oversight and approval of the Library’s policies and objectives, will be provided by the County’s Board of Supervisors and/or the Stockton City Council, who will have the final authority on all Library matters. LSSI’s performance will be monitored by the County Administrator’s Office and/or the City Manager’s Office; these two offices will also serve as the government’s designated liaison for day-to-day operational issues.

LSSI has included detailed information documenting its strong experience in managing public library operations in Section 2.4, Related Experience and References. LSSI has been managing public library operations since 1997; we currently have contracts with thirteen separate city and county governments, and manage public library operations in 63 libraries in five different states. Five of LSSI’s contracts are for county library operations: Finney County, Kansas (1 library); Riverside County, California (33 libraries and 1 museum); Shasta County, California (3 libraries); Jackson County, Oregon (15 libraries); and Jackson-Madison County, Tennessee (2 libraries). Please see Section 2.4 for additional details.

LSSI understands that the County currently shares the expense of Bookmobile services with the City of Stockton. As the RFP instructed, in our Cost Proposals we have included as a separate item the initial costs for a Bookmobile, ongoing operational Bookmobile expenses, and the Bookmobile services provided.

1.11 Deviations or Additions to the Scope of Work
LSSI makes no deviations or additions to the Scope of Work as presented by the County and City in the RFP. See Section 2.7 for LSSI’s only contention about the RFP.

2.3.4 Operational Plan

Hours

As directed by the RFP, LSSI has proposed to provide public library administration and operation services under three different scenarios:

Option A: A combined Stockton-San Joaquin County Public Library System
Option B: A San Joaquin County Public Library System
Option C: A Stockton Public Library System

In addition, we have added two variations for each of these options:

- continuing operations at the current reduced level of library open hours
- operating the libraries at an increased level of library open hours.

The two tables below provide LSSI’s proposed schedules for both the County and City libraries, and show both levels of library hours. **The increased number of hours proposed by LSSI is significant, representing a 47% increase in the hours the libraries are currently open.** The first table provides the proposed schedules for the County libraries; the second, the hours for the City of Stockton’s libraries.

We have emphasized the following elements when constructing the schedule to provide increased hours:

- Increase in Saturday hours
- Increase in Sunday hours
- Increase in number of days open

As with any proposal made before gaining actual on-the-ground experience in each specific library location, the proposed schedules for the increased library hours are simply LSSI’s first cut at distributing the additional hours throughout the library system. We have used our experience in the 63 public libraries we operate across the US to estimate what days and times might be most preferred by the library’s various stakeholders in each community. We anticipate that these schedules might need to be fine-tuned after the start of the contract, when we have had the opportunity to solicit input from the County and/or City officials and the communities.
### SAN JOAQIUN COUNTY LIBRARY HOURS: CURRENT AND PROPOSED

<table>
<thead>
<tr>
<th>County Library</th>
<th>Mon</th>
<th>Tues</th>
<th>Wed</th>
<th>Thurs</th>
<th>Fri</th>
<th>Sat</th>
<th>Sun</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lathrop</td>
<td>Curr 1-6</td>
<td>Closed</td>
<td>1-6</td>
<td>Closed</td>
<td>12-5</td>
<td>Closed</td>
<td>Closed</td>
<td>15</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-7</td>
<td>10-6</td>
<td>10-6</td>
<td>Closed</td>
<td>10-5</td>
<td>10-2</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Linden Branch</td>
<td>Curr 12-5:30</td>
<td>12-5:30</td>
<td>12-5:30</td>
<td>12-5:30</td>
<td>Closed</td>
<td>Closed</td>
<td>Closed</td>
<td>22</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>10-7</td>
<td>10-6</td>
<td>10-5</td>
<td>Closed</td>
<td>10-2</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Mountain House Branch</td>
<td>Curr Closed</td>
<td>1-6</td>
<td>Closed</td>
<td>1-6</td>
<td>Closed</td>
<td>12-5</td>
<td>Closed</td>
<td>15</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>10-7</td>
<td>Closed</td>
<td>10-6</td>
<td>10-2</td>
<td>10-5</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Thornton Branch</td>
<td>Curr Closed</td>
<td>12:30-6</td>
<td>Closed</td>
<td>12:30-6</td>
<td>11:30-5</td>
<td>11:30-5</td>
<td>Closed</td>
<td>22</td>
</tr>
<tr>
<td>LSSI</td>
<td>Closed</td>
<td>10-6</td>
<td>10-6</td>
<td>10-6</td>
<td>10-4</td>
<td>10-4</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Escalon Branch</td>
<td>Curr 10-6</td>
<td>10-6</td>
<td>10-6</td>
<td>10-6</td>
<td>Closed</td>
<td>Closed</td>
<td>Closed</td>
<td>32</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>10-7</td>
<td>10-6</td>
<td>10-6</td>
<td>10-5</td>
<td>Closed</td>
<td>Closed</td>
<td>40</td>
</tr>
<tr>
<td>Ripon Branch</td>
<td>Curr 10-6</td>
<td>10-6</td>
<td>10-6</td>
<td>10-6</td>
<td>Closed</td>
<td>Closed</td>
<td>Closed</td>
<td>32</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-7</td>
<td>10-7</td>
<td>10-6</td>
<td>10-6</td>
<td>Closed</td>
<td>10-4</td>
<td>1-5</td>
<td>44</td>
</tr>
<tr>
<td>Manteca Branch</td>
<td>Curr 11-7</td>
<td>10-6</td>
<td>11-7</td>
<td>10-6</td>
<td>12-5</td>
<td>10-4</td>
<td>Closed</td>
<td>43</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-7</td>
<td>10-7</td>
<td>10-7</td>
<td>10-6</td>
<td>12-5</td>
<td>10-4</td>
<td>1-5</td>
<td>50</td>
</tr>
<tr>
<td>Tracy Branch</td>
<td>Curr 11-7</td>
<td>10-6</td>
<td>11-7</td>
<td>10-6</td>
<td>Closed</td>
<td>10-4</td>
<td>1-5</td>
<td>42</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-7</td>
<td>10-7</td>
<td>10-7</td>
<td>10-6</td>
<td>12-5</td>
<td>10-4</td>
<td>1-5</td>
<td>50</td>
</tr>
</tbody>
</table>

Current Hours: 223
LSSI Hours: 328
Hours Added: 105

### CITY OF STOCKTON LIBRARY HOURS: CURRENT AND PROPOSED

<table>
<thead>
<tr>
<th>City Library</th>
<th>Mon</th>
<th>Tues</th>
<th>Wed</th>
<th>Thurs</th>
<th>Fri</th>
<th>Sat</th>
<th>Sun</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cesar Chavez Central Library</td>
<td>Curr Closed</td>
<td>10-6</td>
<td>11-7</td>
<td>10-6</td>
<td>10-5</td>
<td>12-5</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>10-6</td>
<td>11-7</td>
<td>10-6</td>
<td>10-5</td>
<td>12-5</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Maya Angelou Branch</td>
<td>Curr Closed</td>
<td>11-7</td>
<td>Closed</td>
<td>10-6</td>
<td>Closed</td>
<td>Closed</td>
<td>Closed</td>
<td>16</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>11-7</td>
<td>10-6</td>
<td>10-6</td>
<td>Closed</td>
<td>10-2</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Fair Oaks Branch</td>
<td>Curr 10-6</td>
<td>Closed</td>
<td>11-7</td>
<td>Closed</td>
<td>10-5</td>
<td>Closed</td>
<td>Closed</td>
<td>23</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>10-6</td>
<td>11-7</td>
<td>10-6</td>
<td>10-5</td>
<td>10-2</td>
<td>Closed</td>
<td>36</td>
</tr>
<tr>
<td>Margaret Troke Branch</td>
<td>Curr 10-6</td>
<td>12-7</td>
<td>12-6</td>
<td>12-7</td>
<td>Closed</td>
<td>12-5</td>
<td>Closed</td>
<td>33</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>12-7</td>
<td>12-6</td>
<td>12-7</td>
<td>10-5</td>
<td>12-5</td>
<td>1-5</td>
<td>44</td>
</tr>
<tr>
<td>Weston Ranch Branch</td>
<td>Curr 10-6</td>
<td>Closed</td>
<td>10-6</td>
<td>Closed</td>
<td>12-5</td>
<td>12-4</td>
<td>Closed</td>
<td>25</td>
</tr>
<tr>
<td>LSSI</td>
<td>10-6</td>
<td>10-7</td>
<td>10-6</td>
<td>Closed</td>
<td>10-5</td>
<td>12-4</td>
<td>Closed</td>
<td>36</td>
</tr>
</tbody>
</table>

Current Hours: 133
LSSI Hours: 196
Hours Added: 63
Programs and Services

LSSI has detailed the types of programs and services to be presented in Section 2.3 Project Plan, subsection 1.9 Library Services and Programs. Programming developed and implemented in other LSS–operated libraries includes programming for all age groups: infants and toddlers, preschoolers, elementary age children, young adults, parents, and seniors. LSSI’s programming is inclusive with offerings for home-schooled children, speakers of English as a second language, and people with various types of challenges. LSSI will develop a description and schedule for programs to be presented after assessing the current programming offered, the expressed and unexpressed needs of the community, and the programming resources available to each library. These resources include existing library programming supplies and materials, local talent of various types, and support by area organizations and businesses.

2.3.5 Staffing Plan

The two Staffing Plans below show the staffing levels for each library; the first table shows the staffing needed, based on the current reduced hours of operation. The second table shows the staffing needed for LSSI’s proposed enhanced hours of operation.

<table>
<thead>
<tr>
<th>Library</th>
<th>Branch Manager</th>
<th>Librarian</th>
<th>Library Tech.</th>
<th>Page/ Clerk</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cesar Chavez</td>
<td>1.0</td>
<td>2.0</td>
<td>3.5</td>
<td>1.5</td>
<td>8.0</td>
</tr>
<tr>
<td>Angelou</td>
<td>.5</td>
<td>1.0</td>
<td>.5</td>
<td>2.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Fair Oaks</td>
<td>1.0</td>
<td>1.0</td>
<td>2.0</td>
<td>.5</td>
<td>4.5</td>
</tr>
<tr>
<td>Troke</td>
<td>1.0</td>
<td>1.0</td>
<td>3.5</td>
<td>1.5</td>
<td>7.0</td>
</tr>
<tr>
<td>Weston ranch</td>
<td>.5</td>
<td>.5</td>
<td>2.0</td>
<td>.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Lathrop</td>
<td>.5</td>
<td>.5</td>
<td>.5</td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td>Linden</td>
<td>.5</td>
<td>.5</td>
<td>.5</td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td>Mountain</td>
<td>.5</td>
<td>.5</td>
<td>.5</td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td>Thornton</td>
<td>1.0</td>
<td>.5</td>
<td>.5</td>
<td>2.0</td>
<td>2.0</td>
</tr>
<tr>
<td>Escalon</td>
<td>1.0</td>
<td>1.0</td>
<td>2.0</td>
<td>1.0</td>
<td>5.0</td>
</tr>
<tr>
<td>Ripon</td>
<td>1.0</td>
<td>1.0</td>
<td>2.0</td>
<td>1.0</td>
<td>5.0</td>
</tr>
<tr>
<td>Manteca</td>
<td>1.0</td>
<td>1.5</td>
<td>3.0</td>
<td>1.5</td>
<td>7.0</td>
</tr>
<tr>
<td>Tracy</td>
<td>1.0</td>
<td>1.5</td>
<td>3.0</td>
<td>1.5</td>
<td>7.0</td>
</tr>
</tbody>
</table>
In addition to the assigned library staff shown above, LSSI proposes to use 8.0 FTEs of central administrative staff.

**PLAN 2: STAFFING FOR LSSI’S PROPOSED 524 HOURS OF OPERATION**

<table>
<thead>
<tr>
<th>Library</th>
<th>Branch Manager</th>
<th>Librarian</th>
<th>Library Tech.</th>
<th>Page/Clerk</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cesar Chavez</td>
<td>1.0</td>
<td>2.0</td>
<td>4.5</td>
<td>2.5</td>
<td>10.0</td>
</tr>
<tr>
<td>Angelou</td>
<td>1.0</td>
<td></td>
<td>3.0</td>
<td>1.0</td>
<td>5.0</td>
</tr>
<tr>
<td>Fair Oaks</td>
<td>1.0</td>
<td>1.0</td>
<td>3.0</td>
<td>1.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Troke</td>
<td>1.0</td>
<td>1.0</td>
<td>4.5</td>
<td>2.0</td>
<td>8.5</td>
</tr>
<tr>
<td>Weston ranch</td>
<td>1.0</td>
<td></td>
<td>3.0</td>
<td>1.0</td>
<td>5.0</td>
</tr>
<tr>
<td>Lathrop</td>
<td>1.0</td>
<td></td>
<td>1.0</td>
<td>1.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Linden</td>
<td>1.0</td>
<td></td>
<td>1.0</td>
<td>1.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Mountain</td>
<td>1.0</td>
<td></td>
<td>1.0</td>
<td>1.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Thornton</td>
<td>1.0</td>
<td></td>
<td>1.0</td>
<td>1.0</td>
<td>3.0</td>
</tr>
<tr>
<td>Escalon</td>
<td>1.0</td>
<td>1.0</td>
<td>2.0</td>
<td>2.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Ripon</td>
<td>1.0</td>
<td>1.0</td>
<td>2.0</td>
<td>2.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Manteca</td>
<td>1.0</td>
<td>2.0</td>
<td>3.5</td>
<td>2.5</td>
<td>9.0</td>
</tr>
<tr>
<td>Tracy</td>
<td>1.0</td>
<td>2.0</td>
<td>3.5</td>
<td>2.5</td>
<td>9.0</td>
</tr>
</tbody>
</table>

In addition to the assigned library staff shown above, there are 12.5 FTEs of central administrative staff, including a floating librarian and a floating library technician.

2.3.6 Technology Plan

LSSI will review any existing Technology Plan for the Library. We understand that in June 2009, the Library completed a system-wide upgrade of the information technology system. This upgrade included upgrading or replacing 247 existing computers, and the installation of 62 new computers in the various library branches. Microsoft Office was purchased and installed on all the computers, including both staff and public computers. Wireless Wi-Fi technology was also purchased and installed in all the library branches, providing additional internet access for customers bringing their laptops to the library. LSSI could not find any information on other changes planned for the library; although the Library finalized a Strategic Plan, Facilities Master Plan, and Economic Benefit Study in Spring 2009, there was no mention of a Technology Plan.

In Section 2.3.3, Subsection 1.8 Systems, LSSI provided a description of the many choices facing the Library; the contract choices made by the County and/or City will determine the library technology options available in the Library’s immediate future. We have described various options, and there are additional options which could also be considered. We have also attempted to outline some of the new technology available to the Library and would be happy to provide pricing and implementation timelines for each of these options.

2.3.7 Performance Benchmarks: Source and Monitoring
Built into the short- and long-term goals and objectives identified in the Planning and Performance Monitoring portion of section 2.3.3 will be an on-going evaluation to ensure that LSSI’s San Joaquin County and/or Stockton library team is meeting or exceeding those objectives. This evaluation will consider all key goals and benchmarks needed to determine if resources of all kinds are being correctly allocated, if library materials and services are being used, and what, if any, critical needs are not being met. Examples of typical core performance measurements LSSI would recommend are:

- Are more people visiting the libraries and using library resources?
- Does the collection meet the needs of patrons of all ages, needs, language backgrounds, and abilities?
- Have the circulation and use levels of materials increased?
- Have complaints about lacking materials decreased?
- Have the number and variety of library programs increased?
- Have program attendance levels shown a corresponding increase?

LSSI will advise the County and/or City about the metrics typically used by other libraries, but the specific metrics chosen will be the prerogative of San Joaquin officials and other key stakeholders. LSSI also suggests benchmarking against library systems similar to San Joaquin. As in all contracts, LSSI’s staff members will meet whatever objective demonstrations of success the City and/or County requires, including the generation of regular statistical reports, narrative and verbal reports, and financial and performance audits.

### 2.3.8 Relationships with Existing Vendors

All libraries have existing contracts with many vendors and contractors to provide goods and services. LSSI has reviewed the RFP’s Attachment E, Current Contracts and Agreements. We are familiar with many of these vendors because we deal with them on other LSSI contracts.

LSSI’s Management Team has developed procedures to quickly and efficiently transfer the responsibility for these contracts from the library to LSSI. As soon as a library operations contract has been awarded, a senior-level LSSI staff member will procure copies of all of the Library’s current contracts, including the terms of the contract, and contact names and numbers.

All vendors will be contacted by telephone. The LSSI staff member will explain to each vendor the nature of the new library operations contract between the County and/or City and LSSI, and the need to transfer the financial responsibility for contracts to LSSI. LSSI will update the contact information for each vendor, including a name, phone number, fax number and email address, and provide similar contact information for LSSI to the vendor. The billing address will be changed as quickly as possible through each vendor’s processes.

LSSI will use this contract transfer process as an opportunity to quickly review the Library’s existing contracts, including pricing, remaining contract length, billing requirements and other
factors. No contracts will initially be changed; in order to ensure a seamless transition for the Library and its customers, LSSI will simply transfer the responsibilities at this time. If the contracts are provided to LSSI quickly, we will transfer all contracts within the first few weeks after contract award.

LSSI works with a wide variety of library vendors and suppliers on all of our current contracts for library operations and administration. We have built strong relationships with these vendors and will do the same in San Joaquin County.

2.3.9 Strategy to Vary Services with Funding Level Changes

Many of LSSI’s library clients currently find themselves dealing with new economic realities. Regardless of the type of client—a community, an academic institution, a state government, the federal government, a private firm—LSSI’s approach is to work closely with each client as a partner, helping to define and then design the best possible services available within the new funding limitations.

LSSI maintains strong communication patterns with our clients over time so that funding changes can be anticipated, defined, and planned for. Our approach is to develop contingency plans with options stated and assessed early enough in the budget cycle to allow for thoughtful, thorough deliberations about next steps. Regardless of the site for our current library operations (including Washington, D.C.), our partners are facing new financial demands. LSSI is experienced and effective at helping them plan for necessary fluctuations in spending patterns.

Clause 3 of the Sample Agreements included in San Joaquin’s RFP (page 38 of 48) defines steps and a timeline for learning the future anticipated budget level for library services, for providing information to inform the public budgeting process about proposed levels of services commensurate with upcoming budget levels, for a standard review process of those projections, and for final budget decisions. This process is well thought out and should result in positive outcomes for the library and its customers. It is a standard process for many jurisdictions with which we are familiar from our work in public libraries.

In addition to this standard process, however, our library directors and cognizant Vice President (in this case, Mark Smith, our Vice President for West Coast Operations) stay informed about local revenues and budgeting demands through attendance at local meetings of decision-makers, through frequent conversations with our clients about library spending patterns in our contracts, and through regular, periodic analyses of usage, costs, alternative providers of outside services and materials, and other items that impact spending. In summary, by keeping close tabs on both revenues and expenses, LSSI helps our clients make informed decisions about service levels and other variations resulting from funding level changes.

2.3.10 Business Model
LSSI’s business model is to develop public-private partnerships with local communities in which LSSI guarantees to provide a defined level of services for a firm, fixed price. This approach provides local communities with financial control as well as governance over the community’s library assets. LSSI’s model eliminates the risks of spiraling costs and diminished levels of service by providing accountability according to best business practices.

2.3.11 Potential Marketing Plan

Too often libraries lack exciting marketing for their services, and the citizens of the communities they serve are unaware of the programs and resources they could be using. LSSI believes effective marketing is as critical to the success of a library as it is to the success of a business. We have experience in both areas, and will make public relations for the library an important part of the services we provide to the San Joaquin system.

LSSI proposes to use a part-time Public Relations Specialist to work on marketing the services and resources of the Library, and to promote the Library in the community. LSSI has created numerous successful campaigns for library resources, facilities, and programming for all ages. For example, LSSI’s Riverside County staff won ALA’s prestigious John Cotton Dana Library Public Relations Award in 2005 for the innovative project, "Leer Es Triunfar – Reading is Succeeding," designed to increase the awareness and use of library services among Latino residents through a series of public programs, community events, celebrity television spots and targeted Spanish-language publications. Similarly, our materials promoting Dia de Los Niños/Dia de Los Libros have been very successful in engaging participants.

LSSI’s Management Team, together with the PR Specialist, will conduct a thorough review of existing library marketing efforts and best practices in library marketing, as well as retail marketing strategies and media applicable to the San Joaquin system, and will use this information to develop a comprehensive Marketing Plan for the library, including specific objectives, strategies, media to be used, and costs. The Marketing Plan will provide a tiered approach, outlining publicity opportunities that can be accomplished within the Library’s available resources and those requiring additional funding and resources (i.e., an advertising budget). LSSI will pay particular attention to potential marketing partnerships with the County and/or City and local businesses, and investigate opportunities to leverage local corporate marketing budgets to help increase exposure for the library.

The Marketing Plan will also include a realistic budget detailing the resources necessary to accomplish the objectives described in the Plan. LSSI will assist with creating and implementing strategies to build a budget for the Marketing Plan, including exploring such options as the sale of memberships and in-library concessions. The Marketing Plan will be presented to the County and/or City for approval; after the Plan has been
approved, marketing efforts at the library will be coordinated by LSSI’s PR Specialist, working with the Library staff. LSSI’s Management Team will review the library's marketing efforts on a regular basis to ensure that the services and value of the library continue to be effectively communicated to the community it serves.

2.4 Related Experience and References

LSSI is the leading provider of innovative, progressive services to operate libraries efficiently and effectively in a variety of settings. We operate libraries in five county-wide library systems, in two cities with central libraries and library branches, and in six single-library sites. In total, we provide administration services for sixty-three library facilities nationwide, giving us a breadth and depth of experience that enables us to continually improve both the effectiveness and the efficiency of our client libraries.

Under our operating agreements, LSSI’s client libraries have received numerous awards for outstanding operations, programming, and fund-raising. For example, we received a Merit Award from the California State Association of Counties for our successful operation of the Riverside County Library System, and a Program Recognition Award from the National Council for Public-Private Partnerships. In 2005, the American Library Association awarded the LSSI-managed Riverside County Library System the prestigious John Cotton Dana Award for developing outstanding marketing and PR for literacy programs. More recently, the Riverside County Library System was one of two libraries selected to receive the 2008 Estela and Raul Mora Award from Reforma for its promotion of Día de los Niños / Día de los Libros (Day of the Child / Day of the Book). Riverside County was also selected by ALA to host the prestigious Arbuthnot Lecture last month, the first time in fifteen years that a California library has received this honor.

In 2008 (the latest year for which information is available), the LSSI-operated Germantown Community Library was ranked as the second-best library of its size in the state of Tennessee by Hennen’s American Public Library Ratings (HAPLR). This library has also been selected by ALA as one of only twelve libraries nationwide to receive a grant for the special, high-demand month-long Harry Potter exhibit.

LSSI's Customers Speak: Partnership with LSSI Ensures

- **Return on Investment**: Before LSSI, "Cutbacks left the library system in a shambles...Now we are able to be open more hours and we can add staff. The result has been a win-win for everyone..." (Tom DeSantis, Riverside County, California)

- **Customer and Staff Satisfaction**: "The library staff is feeling good about LSSI assuming this responsibility and the county Commissioners are also onboard." (Melva Barlow, Library Board Chair, Finney County, Kansas)

- **Results**: "In only three years, LSSI has helped our circulation triple, restored Sunday hours, and opened our first branch library. LSSI has met or exceeded all our expectations, and our board recently voted unanimously to extend their contract." (Sharon Younger, Library Board Chair, Jackson/Madison County, Tennessee)

- **Speed to Solution**: "Overnight the City moved beyond just owning a library building. We hit the ground running with LSSI leading the way." (Sharon Goldsworthy, Mayor, Germantown, Tennessee)
LSSI can create efficient yet outstanding operations in our client libraries due to our almost three decades of experience in libraries and LSSI’s substantial corporate resources dedicated to these tasks. Our assets include a lean but talented and motivated headquarters staff of MLS-degreed librarians, human resources specialists, IT and network administrators, and accountants. As a corporation, LSSI has professional librarians at all levels: as owners, senior officers, headquarters staff, library managers at individual sites, members of the Board of Directors, and advisors on the LSSI Advisory Council.

An equally valuable resource to our client libraries is LSSI’s Senior Staff, a group of knowledgeable, experienced LSSI library staff members located in LSSI-operated libraries nationwide. Each LSSI-managed library has at least one representative member in the LSSI Senior Staff group. These employees form a corporate network of library expertise, offering insight and support to each other, and occasionally working to provide corporate support in other locations. This network is strengthened through regular annual meetings of the LSSI Senior Staff at LSSI Day, timed and located to coincide with ALA’s annual conferences. The group currently has 40+ members; LSSI pays for ALA membership for all members of the group, who also attend the ALA Conference. The experience gained in day-to-day library operations in 63 different libraries provides a foundation of knowledge that is available to all of LSSI’s clients; however, the particulars of the service priorities and operations of each community’s library are tailored to meet local needs and demographics.

In sum, LSSI’s years of library work—and thirteen years of experience operating public libraries of differing size, community base, support, organization, and initial condition—have prepared us to contract with San Joaquin to provide effective and efficient administration of its libraries and better serve the public at considerable cost savings. References who can describe LSSI’s contributions to the library services available in their communities are listed in Section 2.2.3 above. Detailed project descriptions for each of LSSI’s public library administration contracts are included in Appendix B.

2.5 Cost Proposals

As instructed by the RFP’s Proposal Content and Format Requirements, LSSI’s Cost Proposals are included in a separate Volume II, contained in a separate, sealed envelope.

2.6 Contentions, Deviations, and Exceptions

In San Joaquin County’s Request for Proposals, Section 14. Resulting Contract, it states, “Terms and Conditions of a resulting contract shall be those of Attachment D ‘Sample Agreements’. Any contentions must be submitted with your RFP.”

LSSI understands the resulting contract will be similar to the County’s Independent Contractor Agreement, a sample of which was provided in Attachment D. Unfortunately the City of
Stockton did not supply a Sample Agreement. LSSI has supplied a copy of its standard Library Administration and Operations Agreement in Appendix E. We feel this Agreement more accurately reflects the scope of services desired in the RFP. Some of the essential Terms & Conditions in LSSI’s standard Agreement are not included in the Sample Agreement provided by the County and will need to be added. Many of the Terms & Conditions in LSSI’s standard Agreement duplicate those in the County’s Agreement, and some are different from those in the County’s Agreement. If LSSI is selected as the firm with which the County and/or City wish(es) to contract, we are confident that a satisfactory Agreement(s) can be negotiated to address the requirements of all parties.

LSSI takes no other exceptions and makes no deviations from the scope of work as set forth in the RFP.
Appendix A. Detailed Resumes for Key Staff Members

- Frank Pezzanite
- Judy Pezzanite
- Ronald Dubberly
- Mark Smith
- Steve Coffman
- Luther Brady
- Jemima Perry
- Yesenia Araiza
- Robert Windrow
Areas of Expertise

- Experienced manager of systems development projects and project management
- Extensive experience in systems analysis, design/development of library automation products and data conversion projects
- Experienced senior manager, co-founder of LSSI, involved in all strategic business decisions
- Entrepreneur with record of launching and growing successful business ventures

Education

- BS, University of Maryland

Frank Pezzanite

Library Systems & Services, LLC

Chief Executive Officer

Aug 1982-Present

Provides leadership and vision for the company in its two core business areas of federal contracting and managing public libraries; directs all LSSI marketing activities, product development, enhancement and support; performs corporate financial management and planning; reviews technical and financial progress of all subcontract and joint venture activity; undertakes consulting work, including oral and written presentations of different phases of state-of-the-art library automation; evaluates, selects, and implements various software packages and turnkey library systems for management and customers. Ensures continued growth and prosperity of the company.

Internet Systems, Inc.

President

June 1982-2003

Completed and managed systems analysis and design projects for the Federal Government, Bound to Stay Bound Books Inc., Massachusetts Board of Library Commissioners, the Mississippi Library Commission, and numerous other library systems. Served for five years on the Information Advisory Council for NASA/STIF in the area of library automation. Database conversion projects for Indiana State University and Montgomery College in Maryland, libraries in New York, Louisiana, Mississippi, and Texas. Authority control; standardizing name and subject headings within library databases against Library of Congress and other authority records, including databases of numerous public and university libraries.

Informatics, Inc.

Director, Library Information Services

Aug 1973-June 1982

Directed all product sales and contract work handled by the department. Developed all business plans and directed all system development projects in this area. Personally responsible for the development of the MINI MARC cataloging system and the BIBPRO IV bibliographic products software package. MINI MARC provided access to complete Library of Congress MARC database on floppy diskettes, displayed these records in standard MARC format, and allowed editing of records to conform to local cataloging conventions. It was installed in more than forty libraries throughout the United States and Canada.
### Judy Pezzanite

#### Areas of Expertise
- Experienced senior manager, co-founder of LSSI, involved in all aspects of operations and management of the company
- Experience with developing statistical reporting systems to track contract performance, personnel performance, and fiscal performance
- Entrepreneurial experience in the design of strategic initiatives for customer support
- Expertise in developing and managing innovative library services

#### Education
- MLS, University of MD
- BA, Ohio State University

**Library Systems & Services, LLC**  
*Chief Operations Officer*  
1982-Present

As a founder and co-owner of LSSI, oversees all operational activity for LSSI’s public library operations and library support services contracts. Handles client contact and reporting. Manages a total corporate staff of more than 800, responsible for more than $30M in annual revenues in library operations and outsourcing. Actively participates in the direction and management of several large federal contracts and is responsible for the technical and fiscal performance of those contracts, including a cataloging and processing contract with the Smithsonian Institution and a large inventory and barcoding contract for the Library of Congress (RHIP). As part of LSSI’s Transition Team, provides on-site hands-on management and coordination during project start-up for new LSSI public library operations contracts including recruiting and directing staff, establishing operational workflows and schedules, facilities’ design and layout, acquisitions of needed supplies and equipment, and assignment of transition tasks. Assists with recruiting top level management and professional staff for the company. Creates training and staff development programs including employee and management incentive programs. Prepares detailed statistical and narrative reports for clients and corporate management staff. Ensures LSSI and its staff adhere to core business values with a unified corporate vision.

**Informatics Inc.**  
*Project Director*  
Jan 1972-Aug 1982

Project Director for the Library Information Services Division on a wide variety of projects for federal government agency libraries. Responsible for cost control, supervision of staff, management of technical operations, client contact dealing with contractual matters, development of computerized bibliographical systems for library and information centers, recruiting and training, and marketing services, including proposal writing. Handled consulting assignments in the areas of acquisitions, cataloging, and library technical processing. Managed two large contracts for total library operations under mission support contracts for the U.S. Department of Energy Libraries, and NASA Goddard Space Flight Center Library; both of these contracts were competitively re-awarded several times under open competition.
Ronald Dubberly

Areas of Expertise
- 39 years experience as a library consultant and director of library systems
- Extensive experience developing strategic plans and conducting management assessments including evaluations of staff, systems, and management processes and resources
- A frequent speaker on the changing needs of libraries and their users, and constituent-based management perspectives in public libraries
- A recognized building space planner

Education
- MSLS, Florida State University
- BA, Jacksonville University

Library Systems & Services, LLC
- 2008-Present
  President, Public Library Operations
  Mr. Dubberly oversees LSSI’s public library operations, with emphasis on service improvement, strategic planning, and facility planning assistance. Also coordinates corporate training activities, and company-wide best practices documentation and implementation.

Dubberly Associates, Inc.
- 1995-2008
  Dubberly Garcia Associates, Inc.
  Principal Consultant
  Consulted on library planning, surveys, employment screening and needs assessment projects for LSSI and for major public, academic and municipal libraries throughout the US. Worked closely with clients to design and refine long- and short-range plans, evaluations, facility planning, staff training and development, funding options, surveys and operational development analyses. Ensured that all information needs were carefully considered, that the proper data was gathered, and that goals and objectives for the planning process were clearly established. He has experience analyzing study findings and developing effective recommendations based on these findings. Developed professional presentations of findings and met with clients to ensure that any questions concerning the data or findings were answered.

Library Systems & Services, LLC
- 2008-Present
  President, Public Library Operations
  Mr. Dubberly oversees LSSI’s public library operations, with emphasis on service improvement, strategic planning, and facility planning assistance. Also coordinates corporate training activities, and company-wide best practices documentation and implementation.

Dubberly Associates, Inc.
- 1995-2008
  Dubberly Garcia Associates, Inc.
  Principal Consultant
  Consulted on library planning, surveys, employment screening and needs assessment projects for LSSI and for major public, academic and municipal libraries throughout the US. Worked closely with clients to design and refine long- and short-range plans, evaluations, facility planning, staff training and development, funding options, surveys and operational development analyses. Ensured that all information needs were carefully considered, that the proper data was gathered, and that goals and objectives for the planning process were clearly established. He has experience analyzing study findings and developing effective recommendations based on these findings. Developed professional presentations of findings and met with clients to ensure that any questions concerning the data or findings were answered.

Used unique and innovative approaches to assess client needs, including discussion groups, brainstorming sessions, community telephone and email surveys, and user and employee satisfaction surveys. He has extensive experience in assessing staffing needs and employee qualifications, developing training programs, and supporting collection assessment and planning operations.

Atlanta-Fulton County Public Library System
- 1985-1995
  Library Director
  Efforts focused on improving services, systems, and the management and operation of library staff and facilities. Constructed twenty-three new and expanded libraries, including an African-American research library. Introduced homework help centers, expanded literacy services and established outreach service programs for public housing communities. Management improvements he introduced led to increased accessibility of library collections, increased public services hours without additional staff, and the addition of nearly $2 million in grants for library collections and other projects.
Areas of Expertise

- Senior manager experienced in all aspects of public library operations including extensive experience managing large multi-branch library systems
- Experienced in library facility design, renovation, expansion of library operations
- Proficient in developing grant-writing and other alternative funding options

Education

- MLIS, University of Texas at Austin
- BA, University of Texas at Austin

Library Systems & Services, LLC 1999-Present

Vice President, Library Operations: West

Oversees LSSI’s public library operations in the states of California and Oregon, including contracts with Riverside County, Shasta County, and the City of Moorpark in California, and Jackson County, Oregon. Reviews fiscal and operational statistics, directs planning for the libraries under his supervision, manages corporate resources. Significant interaction and involvement with community leaders and local governance of public library contracts, including work with Friends Groups, Library Boards, and Foundations.

Library Systems & Services, LLC 1999-Present

Riverside County Library System (RCLS)

Administrator/Deputy Administrator

Manages daily operations of the RCLS, which serves a population of nearly one million in a 7500 square-mile county through 33 branches and 2 bookmobiles. Serves as liaison with County Librarian; provides fiscal management of RCLS; and supervises employees in the library branches, automation department, special projects, and the library management office. Coordinates the development of new library facilities and supervises the purchase of more than $1 million/year in materials for the system, including opening day collections for new libraries. Monitors all grant activities including grant applications and management of grant-funded projects. Named the California Library Association Member of the Year in 2003.

Texas Library Association

Director of Communications

Jan 1997-June 1999

Coordinated the advocacy and government relations activities and edited publications for the largest state-based library association in the United States.

Texas State Library

Library Systems Administrator

Apr 1991-Dec 1996

Administered a $7.7 million project with more than 80 full-time staff in ten regional offices that provided funding and technical assistance to Texas public libraries. Coordinated library development planning activities, including a statewide library plan.
Areas of Expertise

- Nationally recognized advocate for libraries with numerous published articles, major presentations and keynote addresses
- Experience developing and managing innovative library services
- Extensive website development experience and electronic access to library services
- Network of key contacts that can be called on the help when needed

Education

- MLS, UCLA
- BA, San Francisco State University

Library Systems & Services, LLC 2004-Present

*Vice President, Public Library Operations/East*

Responsible for management and performance of LSSI’s public library contracts in Texas, Tennessee, and Kansas. Management activities include supervision of professionals, paraprofessionals, and clerical staff. Responsible for hiring, firing, staff development, workplans, program development, collection analysis and development, technology, facilities, and fiscal management, including budgets. Significant interaction and involvement with community leaders and local governance of public library contracts.

Library Systems & Services, LLC 2000-2004

*Vice President, Product Development*

Managed the development and implementation of new products and services for LSSI including Virtual Reference, and new initiatives in library funding and operations. Projects included developing retail concession and corporate sponsorship programs for public libraries, adapting NPR-style funding models for public libraries, and exploring new collection development and cataloging technologies.

Los Angeles County (CA) Public Library 1993-2000

*Director, Research Services*

Managed the Business Subject Specialty Center for the County. Led a project to develop live, Web-based reference services for the LA County Library System, based on the call center model. Continued to manage FYI Government Information Services to provide advanced research and information services to city governments. FYI became one of the most highly regarded fee-based public library research services in the US.

Los Angeles County (CA) Public Library 1989-1993

*Director, FYI*

Developed and operated FYI, the County Library entrepreneurial fee-based research and information service. Developed and managed FYI from start-up into one of the best-known and most respected services of its type. Extensive hands-on experience using and negotiating with most of the major commercial online services, particularly business resources.
Luther Brady

Areas of Expertise

- Network Administrator with more than 20 years of experience in developing solutions and products to meet library computer and networking needs
- Experienced on a wide variety of systems and software
- Network of contacts with major library automation vendors and ability to troubleshoot system problems

Education

- Microsoft Certified Systems Engineer, MCT and MCP, A+ Certified
- BS, University of Idaho

Library Systems & Services, LLC

Senior IT Manager

Coordinates West Coast library automation efforts for LSSI. Supports automated library systems at Riverside County (CA) Library System and server complex jointly serving Riverside County and San Bernardino County (CA) Library Systems. Supervises staff and manages data center.

Auto-Graphics, Inc.

Manager, New Product Development

1992-1999

Managed development of library division’s web-based IMPACT/ONLINE State-wide regional library resource sharing system. Managed library products including CD, small library management system (SLiMS), retrospective conversion, record upgrade, authority control and other database processing. Responsible for internal LAN and external Internet network. Provided network needs analysis and justification.

Auto-Graphics, Inc.

Vice President, Library Operations

1991-1992

Concluded two-year migration from IBM assembler to UNIX C+ based systems. Structured training for project managers and other support personnel in the new UNIX C+ environment.

Dynix/RetroLink Associates, Ltd.

President

1989-1991

Expanded annual sales from $200,000 to $1 million. Managed growth from a dozen to 100 part-time technically trained data entry personnel. Developed automated retrospective conversion support system, employee training programs and sales support systems.

GEAC, Inc.

Manager Product Development

1987-1989

Managed GEAC’s office. Responsible for the integrated library system “ADVANCE” including development, programming, sales support, customer implementation and technical support.
## Jemima Perry

### Areas of Expertise

- Customer service
- Extensive technical services knowledge
- Public relations

### Education

- B.A., Pierce College
- A.A., Columbia State College

### Proposed Position – LSSI Management Team

#### Library Systems & Services, LLC  
*Aug 2007-Present*

**Director of Training and Transition**

Responsible for company-wide customer service training, including the development of multi-media presentations. Assists with transitions of libraries to LSSI management. Plans and implements specialized training for staff.

#### Library Systems & Services, LLC  
*1998-2007*

**Calabasas Library**

**Library Technician/Circulation Supervisor**

Supervised and trained staff at the circulation desk. Supervised the maintenance of the library stacks. Recommended new circulation policies and procedures. Created circulation manual and online training programs. Established performance objectives, reviews, and evaluations. Headed the ILL department including conducting ILL searches and maintaining ILL files. Assisted with collection development. Resolved patron problems and complaints. Promoted library public relations.

#### Los Angeles County Public Library  
*1995-1998*

**Calabasas Library**

**Library Assistant**

Managed library branch. Responsible for patron registration and circulation functions. Collected fines and handled overdue notifications and the collection of delinquent accounts. Conducted online searches and shelved materials.

#### Los Angeles County Public Library  
*1992-1995*

**Las Virgenes Library**

**Library Assistant**

Worked at circulation desk. Created a database of the Library’s audio-visual materials.

#### Vanderbilt University Library  
*1989-1991*

**Library Assistant**

Performed multiple duties in serials area including receipt and check in of journals, bindery preparation, and maintenance of pamphlet files. Assisted students with online searching.
Yesenia Araiza

Areas of Expertise

- Graphic design for library publicity materials
- Design of patron supplies such as bookmarks and library cards
- Design of commissioned artwork for special initiatives such as all publicity materials for the California Día de los Niños/Día de los Libros webpage
- Magazine and web designs for library interests
- Media Marketing Approaches

Education

- B.A., Fine Arts
  University of California, Santa Barbara

Design Awards

- PR Excellence Award
- Liquid Library Design feature

Library Systems & Services, LLC

Proposed Position – Graphic Artist

- 2006-Present

*Graphic Artist*

Responsible for providing a professional look to LSSI materials for all programs and services. Assists LSSI library staff in promoting programming through posters, brochures, fliers, and bookmarks. Designed library cards for all West Coast locations, including a set of four alternate designs among which users in Jackson County, Oregon can choose. Designs all LSSI business stationery, including letterhead, envelopes, and business cards for all West Coast locations, as well as special assignments such as artwork for the new Riverside County Bookmobile, launched in June 2008. Upon request from the Southern California Library Cooperative (SCLC), designed and produced all marketing materials for the statewide Día de los Niños/Día de los Libros webpage. (See [http://www.diacalifornia.org](http://www.diacalifornia.org).)

*The Sun Newspaper, San Bernardino*

Marketing Graphic Artist Supervisor

- Nov 1999-2006

Created, developed, produced and executed marketing tactics, branding and messaging strategies to promote the products of the newspaper. Led a team of art staff in providing artwork of various types for marketing communications and displays.

*Recycler Classified*

Advertisement Designer & Advertising Assistant

- July 1994-Nov 1999

Responsible for typesetting and design of advertisements using Quark Express and Photoshop. Performed some bookkeeping duties.
Areas of Expertise

- Sales and Marketing
- Integrated Library Systems
- Business Development
- Library Automation
- MARC Database Processing
- Authority Processing
- Barcode Label and RFID Implementations

Education

- B.A., Economics, University of Maryland

Robert Windrow

Library Systems & Services
Vice President, Sales & Marketing
June 1990-Present

Responsible for LSSI’s sales and marketing activities and all operational aspects of the Data Services Division of LSSI. This division is responsible for MARC database preparation services, authority control processing services, barcode label and RFID implementations.

Nationwide Fulfillment Systems, Inc.
President, Chief Operating Officer
1989-1990

Responsible for all operational aspects of the company. Developed the company’s first business plan, reversing a $1.2 million loss to a $200,000 profit. Created budgets, financial measurement and forecasting system. Reduced payroll expense by 20% and aged accounts receivable by more than 40%. Realigned middle management to focus on client services for dramatic improvement in customer satisfaction.

CLSI, Inc.
Vice President of Sales
1982-1989

In the role of Vice President of Sales, created a marketing and sales department for this early library circulation system vendor. Established a telemarketing department as well as a sales support organization to include: training, demo support, bid and proposal departments, and competitive analysis. Directed the company’s presence at professional meetings, creating customer events, user group meetings, and other public relations, sales and customer support opportunities. From 1982 to 1988, corporate revenues increased by 300%. Negotiated the largest single contract in the history of library automation for a total of $7.5 million. Instrumental in the successful sale of CLSI to TB, Inc. Developed and implemented an automated sales forecast and account tracking system and managed a $3 million sales and marketing budget.

Informatics, Inc.
Director, Sales and Marketing
1979-1982

Created a sales and marketing department for Library Information Systems Division, selling library automation products including the MINI MARC minicomputer cataloging system, and BIBPROIV, and mainframe based system to generate book catalogs and various types of library indexes. Developed successful product advertising and sales promotion campaigns. Managed a $500,000 budget and was responsible for recruitment and training of the sales force.
Appendix B.  Related Project Descriptions

- Arlington (TN) Sam T. Wilson Public Library
- Collierville (TN) Lucius E. and Elsie C. Burch Jr. Library
- Finney County (KS) Library System
- Germantown (TN) Community Library
- Jackson County (OR) Library Services
- Jackson-Madison County (TN) Library
- Leander (TX) Public Library
- Millington (TN) Public Library
- Moorpark (CA) Library
- Red Oak (TX) Public Library
- Riverside County (CA) Library System
- San Juan (TX) Public Library
- Shasta (CA) Public Libraries
Library Operation and Administration Services

LSSI was awarded a contract to operate the Sam T. Wilson Public Library in Arlington, TN following a competitive bid process. This library was previously part of the Memphis-Shelby County Library System, which left the system when the County withdrew its financial support for library services.

LSSI’s staff spent four weeks preparing the library for its grand reopening. Housed in an architecturally-significant building, the library was refurbished, shelving re-oriented, materials displays reorganized for maximum impact, carpets cleaned, and excessive signage removed. The children’s area, computer area, and reference materials were relocated to better suit the library’s unique semi-circular layout. Staff was hired and trained, new library cards designed and purchased, new materials processed and displayed, and the new Sirsi computer system and database installed. Children’s programming was developed and a Summer Reading Program designed to begin the day the library’s doors opened. Both circulation and the number of people attending programs have soared. The library has undergone a cosmetic overhaul, adding new shelving units, seven new public use computers, and specialized storage systems for library media.

LSSI’s staff works closely with the Mayor, Town Administrator and the Library Board to develop and implement policies, programs and resources to meet the information needs of the residents of Arlington. The Library was asked to organize the community’s 40th birthday gala for the library in 2007 which was enjoyed by all.

The Library hosts a Home Schooled Book Club which is eagerly attended by users from a large area. The Library assists local schools with events like Registration Day and Read Across America Week; the Library also serves as an exam proctoring site. Other successful outreach programs include reading to the Arlington Developmental Center residents, and delivering magazines to local hospitals.

The Library is part of the Wolf River Library Consortium (WRLC), sharing a Sirsi ILS, daily courier service, a leased book program, e-books, and access to 42 databases.

“Arlington has such an awesome library! Our three librarians are absolutely top-notch and I consider them to be treasures in our community. We have so benefited from this community library. The children’s programs are wonderful. The staff is always professional, knowledgeable, and courteous.”

Melissa Leatherwood
Library Customer
Arlington, TN
Library Operation and Administration Services

Through a competitive bid process, LSSI won a contract to operate the Lucius E. and Elsie C. Burch Jr. Library in Collierville, TN. During a closure of only fifteen days, LSSI hired and trained staff, purchased and installed a new integrated library system (SIRSI Unicorn), created a new catalog database from brief inventory records, acquired new patron cards, and established acquisitions and processing profiles with vendors. Collierville installed a new telephone and paging system as well as all new computers in the three-year-old building.

In the brief project start-up, LSSI staff members in the library interviewed, hired, and trained new and incumbent staff, established library schedules, reorganized workflows, and revamped materials displays. Patrons were re-registered and given new borrower cards. New library programs for children and adults were implemented. An LSSI Interim Library Director oversaw library operations until a permanent Library Director was hired. Library hours were expanded and Sunday hours added. The library is now open Monday through Thursday from 10:00 am to 8:00 pm, Friday and Saturday from 10:00 am to 6:00 pm, and on Sunday from 12:00 to 4:00 pm.

LSSI worked closely with the Mayor, City Administrator and Library Board to develop and implement programs and resources to meet the information needs of Collierville’s citizens. Adult and teen programming was added to the Library’s schedule. LSSI identified and acquired funding for an attractive sports-themed Teen Center in the Library. Programs for seniors were added, including an AARP driving certification program which earns participants discounts on their auto insurance, and an AARP tax preparation specialist, provided each year at no cost to library users. In 2009, the Library applied for and was selected for a two-month traveling Smithsonian exhibit about the White House Gardens, which drew visitors from all over Tennessee and neighboring states.

The Library is a member of the Wolf River Library Consortium (WRRLC) which provides ILL, courier service, leased books, e-books, 42 online databases, and outreach to special needs users.
Library Operation and Administration Services

Under a library operations and administration contract which began in January 2003, LSSI provides the library staff to operate the Finney County Library System. LSSI operates all aspects of library operations, including programs, collections, public services, technical services, staffing, training, automation, facilities maintenance and planning, budgeting and financial processes.

During the first six months of the contract, LSSI’s interim Project Manager recruited and hired a permanent Library Manager, analyzed and realigned staff responsibilities, conducted numerous staff training sessions, developed a reporting format, and redesigned the existing operational workflow. He also provided orientation for the new Library Director, to ensure a seamless transition for Finney County residents and the library staff.

Specific actions taken by LSSI as result of our operational analysis include:

- Trained staff in customer service and teambuilding
- Trained staff in reference service using print and electronic formats, stressing the reference interview
- Trained staff to better use the Dynix Horizon circulation system and other Horizon modules
- Developed and implemented weeding guidelines
- Completed preliminary information technology planning and budgeting
- Analyzed workflow for technical and public services
- Assessed and enhanced youth services programming

LSSI continues to focus on the need for specific service delivery, better collection development and management, increasing use of information technology, space utilization and facilities planning, and has completed a Strategic Planning process, resulting in a five-year Strategic Plan for the Library. LSSI recently completed a competitive procurement process for the replacement of the Library’s Horizon system, and has successfully implemented the Library’s new Polaris ILS.
Germantown (TN) Community Library

Library Operation and Administration Services

The Germantown Community Library, formerly a busy branch of the Memphis-Shelby County Library System, became an independent library after Shelby County phased out county support for public library service. Replacing county funding with local funding, city officials could have contracted with the City of Memphis or made the library a City department; instead, they chose a contract with LSSI as the most cost-effective option.

The library was closed for just three weeks. Germantown painted the building inside and out while LSSI recruited a totally new staff and installed a new SIRSI Unicorn ILS, used a six-month old inventory tape to create a new cataloging database, ordered and processed $18,000 of new best-sellers, and designed and purchased 60,000 new patron library cards.

LSSI recruited and hired a talented staff who hit the ground running, working tirelessly to prepare for the grand opening in record time. The building was rearranged to remove obstructions and improve flow, the collection inventoried, a flood of returned materials re-shelved, and 3000 patrons registered in the first two days of service. LSSI worked closely with city officials during the transition period.

Opening day was a huge success, with a refurbished facility, expanded hours of service, a new automation system, and a new staff. Patrons were excited by the visible changes.

In 2006, the Tennessee Genealogical Society selected the Germantown Community Library as the repository for their collection of more than 15,000 items. The City of Germantown renovated an existing former library building to hold this outstanding collection. The new library opened in November 2006 as a branch of the Germantown Community Library called Germantown Regional History & Genealogy Library Center.

The Library participates with other LSSI-managed libraries in the Wolf River Library Consortium (WRLC), which provides a shared automation system, daily courier service for ILL, leased books, e-books, and 42 databases accessible at the libraries or at home. The Library was ranked the second best Tennessee library of its size in the 2008 HAPLR rankings.
Library Operation and Administration Services

LSSI has operated the 15 branch libraries of the Jackson County (OR) Library Services since 2007, providing a full range of library services: acquisition; cataloging; reference; circulation; ILL; collection maintenance; automation management; bookmobile and outreach services; coordination with Friends groups; and volunteer programs.

The libraries had been closed for six months, so LSSI and the County reviewed and revamped the system's role, hours, collections, and programming. Accomplishments include:

- Completed collection analysis and needs assessment, including the need for services for previously underserved populations
- Implemented new programming for all users, including story times in all branches, summer programs, adult and teen book discussion groups, and adult computer classes
- Established links to community agencies including day-care centers, Healthy Start, and groups serving homebound adults
- Created programming featuring noteworthy local citizens such as such as a poetry writing workshop taught by the state poet laureate, a Monday night lecture series at the Medford branch, and a Thursday night activities evening at Eagle Point
- Solicited and used of grants, gifts, and donations for special needs such as materials to celebrate Hispanic heritage and a “Summer Reading on the Road” program from Wal-Mart
- Established flexible operating hours for all branches based on usage, and allowed communities to purchase additional hours of service to supplement county hours
- Moved library automation operations in-house, resulting in improved communications and cost-effectiveness
- Completed a strategic planning process with the input of community leaders from across the county.

Several communities in the County have provided funds to the County to keep their libraries open additional hours. As of spring of 2010, the libraries have achieved usage levels that exceed the pre-closure levels and are accomplishing that with roughly 2/3 of the pre-closure expenditures.
Library Operation and Administration Services

In 2006, LSSI won a contract to provide labor and operational services to the Jackson-Madison County Library. The Library Board of Trustees hoped to help the library move forward with much needed changes. LSSI works closely with the Board, appointed officials, the regional library, and community groups such as the Friends of the Library.

The Jackson-Madison County Library provides a wide variety of services to a diverse population. The library offers unique community resources, including a local history and genealogy library as well as highly-developed adult programming. Change was needed in technology, collection development, children's services, and increased access to resources for newer parts of the community.

In the first six months of operation, LSSI relocated the public access computers from a small, dark room to the airy main floor of the library, added Envisionware software for PC scheduling and print management, installed an automated phone system to make more efficient use of staff time, moved reference staff and resources from the mezzanine to the main floor to encourage use by patrons, weeded the outdated fiction collection, set up vendor accounts to order pre-processed books, and worked with the staff to order new books to update the collection.

The Library badly needed a branch library in the fast-growing northern part of the city. In December 2007, LSSI opened a new North Library in a 2500 square foot storefront location. The library, decorated in welcoming colors and furnished with modern bookstore fixtures, houses a collection selected specifically for this location. North Library has been very busy since its opening, and has also spurred increasing use of the main library resources. LSSI and the Board of Trustees are currently seeking a larger space for this library and investigating the feasibility of opening a similar branch in the southern part of the city.

“In only three years, LSSI has helped our circulation triple, restored Sunday hours, and opened our first branch library. LSSI has met or exceeded all our expectations, and our Board recently voted unanimously to extend their contract.”

Sharon Younger
Library Board Chair
Jackson/Madison County
Leander (TX) Public Library

Library Management Services

LSSI operates the Leander Public Library under the direction of the City Manager, managing all aspects of the Library to provide efficient and cost-effective administration and delivery of services to library patrons. The Library moved from an 1800 square foot facility to a new 17,000 square foot building. Under a consulting contract, the City of Leander used LSSI’s building expertise to review the architectural drawings recommend the design and layout of the interior of the new Library.

As the new library neared completion, during a two-month transition period LSSI interviewed, selected, hired and trained experienced and qualified staff. The library provides high-quality services and programs during the Library’s 74 hours of operation, spread over seven days a week. LSSI’s Management Team provides orientation, training, and ongoing personal and professional development for the library staff.

The Library uses a TLC Library.Solution ILS, and two patron RFID self-charge units and security system from TechLogics. LSSI trained the new staff to use the new system and to train patrons on the use of the self-check units.

LSSI’s successes in managing the Leander Library include:

- Purchasing an opening day collection of $25,000 in new library materials
- Identifying several alternate sources of funding
- Implementing automation enhancements to ensure state-of-the-art approaches to customer access and satisfaction
- Increasing rates of circulation of library materials, number and variety of library programs for all ages, number of visitors to the library, number of library borrowers, number of reference questions answered, and hours of operation
- Securing grant funding to implement new services including literacy programs and outreach to underserved populations

Project Description

Customer
- City of Leander, Texas

Address
- P.O. Box 940
  Leander, TX 78646

Contact
- Biff Johnson
  City Manager
  (512) 528-2712

Start Date
- October 2006

Staffing
- 13 FTE

“The library is doing GREAT - thanks to your staff and your guidance”

Vic Villarreal, Ph.D.
Mayor Pro-Tem
Leander, TX
Millington (TN) Public Library

Library Operation and Administration Services

The City of Millington, TN awarded a contract to LSSI to operate the Millington Public Library following a competitive bid process. This library was previously part of the Memphis-Shelby County Library System, leaving the system when the County withdrew its financial support for library services.

LSSI’s staff worked closely with the Mayor, City Administrator and the Library Board to develop and implement programs and resources to meet the information needs of the residents of Millington. LSSI has implemented service and operations improvements, recruited a high quality staff, improved and expanded the library’s collections, and developed creative and educational programming for the children, teens, and adults of Millington, Tennessee.

LSSI spent four weeks preparing the library for its grand reopening, which fell on the 50th anniversary of the founding of the original library. Shelving was painted and re-oriented to create open areas, obstacles to patrons were removed, the children’s area was moved and refurbished, the library was thoroughly cleaned, new library cards were purchased, staff was hired and trained, and programming for children and adults was created. The City painted the walls, cleaned the carpets, and restored the library grounds. A Summer Reading Program was implemented, and began the day after the Library’s doors re-opened.

New public access computers were installed and an ambitious new series of computer training courses for various age groups has been well-received by the community. The number of children’s story times have tripled, and the library’s hours have been shifted to more closely match the needs of residents.

The Library has joined other LSSI-managed libraries in the area to create the Wolf River Library Consortium (WRLC), sharing an automation system, daily courier service between the libraries for ILL, a leased book program, e-book access, and access to 42 databases.

In response to recent fears about swine flu, the library staff has implemented an ambitious program of book cleaning; the cover of every book returned to the library is wiped clean before being re-shelved, earning many pleased responses from the community.

Project Description

Customer
- City of Millington, Tennessee

Address
- 4858 Navy Road
  Arlington, TN 38053

Contact
- Richard Hodges, Mayor
  (901) 872-2211

Start Date
- May 20, 2005

Staffing
- 5 FTE

“It has been a pleasure to work with the LSSI management team and to realize that their vision and ours were the same. Our relationship with LSSI has been easy and relaxed, and it’s been like working with old friends and neighbors.”

Sue Nan Hartley
Library Board Chair
Millington Public Library
The Moorpark Library, formerly a branch of the Ventura County Library System, became an independent city library after the City of Moorpark decided to leave the county system. City officials chose a contract with LSSI as the most effective and efficient option to run the new city library.

The library was closed for only two weeks for the transition. In that time, LSSI repainted the inside of the building and recruited and trained a staff, which includes two fulltime professional librarians. The talented new staff hit the ground running, working tirelessly to prepare for the grand opening. The building was rearranged, refurnished, and 12 new public internet computer workstations installed. A new library website was created. Opening day was a huge success, with a refurbished facility, expanded hours of service, a new automation system, and a new staff. Patrons were excited by the visible changes. LSSI worked closely with city officials during the transition period. Sunday was added as an open day, expanding open hours to 58 per week. Several thousand patrons registered for new library cards within the first months of service.

In the first six months of the contract, a large portion of outdated material was weeded and $70,000 worth of new books was ordered, including a large selection of bestsellers, audio books on CD, DVDs, music CDs, children's books, and Spanish books. An extensive electronic resource database was also added and is available to patrons at home from the library’s website.

The Library has joined MCLS, a cooperative of 42 other area libraries, in order to expand their resource sharing base, facilitate interlibrary loan service, and provide comprehensive second-level reference service. LSSI’s staff won a grant to provide a homework help tutor, available online with a library card. Children’s programming was instituted with weekly story times, school tours and a Summer Reading Club. Adult programming, which has never previously been offered in Moorpark, began in fall 2007. LSSI is participating in city plans to build a new 25,000 square foot library facility.
Red Oak (TX) Public Library

Library Operation and Administration Services

The City of Red Oak, TX is a fast-growing small community thirty minutes south of downtown Dallas, TX. LSSI helped the City of Red Oak establish a new public library which meets the standards for membership in the North East Texas Library System (NETLS).

Through a consulting agreement, LSSI advised the City on the arrangement and furnishing of the new library space, located inside the brand-new City of Red Oak Municipal Building. LSSI’s Management Team members met with the City’s architects and contractors to discuss the finishing of the library’s space. LSSI oversaw the installation of the library’s shelving and the purchase and placement of library furniture and fixtures. The library partners with the Lancaster Veterans Memorial Library to share an Innovative Interfaces library automation system, providing a high-quality system to residents at a minimal cost to the City. LSSI also created a website for the library, which is maintained by library staff members.

LSSI interviewed, hired, and trained all library staff members. The 1200 square foot library opened on September 12, 2005. The library, which occupies one room in the Municipal Center, is open 40 hours a week, providing services including Live Homework Help, Learn-A-Test test-taking preparation databases, a Summer Reading Club with activities and prizes, programming for children and adults, and the resources available through the Texas State Library System, including TexShare databases.

Library outreach initiatives include mounting eye-catching displays in the library’s highly-visible space, just inside the front door of the new Municipal Building.

The City plans to expand the current library to keep pace with the community as Red Oak grows from its current population base of about 8000 to become one of the largest cities in the county over the next twenty years as it annexes adjoining land.

LSSI is helping the City to seek and apply for grant funding to assist in the building and furnishing of a new library building.

---

<table>
<thead>
<tr>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer</strong></td>
</tr>
<tr>
<td>City of Red Oak, Texas</td>
</tr>
<tr>
<td><strong>Address</strong></td>
</tr>
<tr>
<td>200 Lakeview Pkwy</td>
</tr>
<tr>
<td>Red Oak, TX 75154</td>
</tr>
<tr>
<td><strong>Contact</strong></td>
</tr>
<tr>
<td>Tim Kelty, City Manager</td>
</tr>
<tr>
<td>(972) 617-6831</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
</tr>
<tr>
<td>September 2004</td>
</tr>
<tr>
<td><strong>Staffing</strong></td>
</tr>
<tr>
<td>1.5 FTE</td>
</tr>
</tbody>
</table>

“I would like the Mayor and City Council to recognize you and your staff at the regular City Council meeting. Your ability to obtain grants and your operation of the Red Oak Public Library has been superb.”

Ken Pfeifer  |
Town Manager  |
Red Oak, TX
Library Operation and Administration Services

Since July 1997 LSSI has managed and operated the Riverside County Library System (RCLS) that now includes 34 branches and two bookmobiles. The County Board of Supervisors remains the policy-making body for RCLS and retains ownership of all Library assets. LSSI provides:

- Acquisition of library materials
- Cataloging and classification
- Reference and research for adults and children
- Circulation, ILL, collection maintenance
- Mail distribution and messenger service
- Branch library operation, including security
- Library automation management
- Network design and administration
- Bookmobile and Outreach services
- Coordination with Friends of the Library and volunteer programs

LSSI doubled library operating hours, increased staffing 104%, and increased spending on books and library materials from $180,000 to $2.5 million in 2008. LSSI has directed more than 20 building projects, including new branches and renovated libraries; 6 new projects are planned or under construction, including joint-use projects with area schools and partnerships with other jurisdictions and agencies.

LSSI has received more than $4M in grants for RCLS, including literacy grants, the creation of a teen reading center, an after-school tutoring program, and a nationally recognized model for tutoring reading. In 2005, the Leer Es Triunfar Latino outreach project won the prestigious John Cotton Dana library public relations award. RCLS was recently selected to host the 2010 Arbuthnot Lecture, the first time in 15 years a California library was chosen.

The contract has been renewed several times, most recently for 2007-2012, showing the County's continued satisfaction.
San Juan (TX) Public Library

Library Operation and Administration Services

In May 2007, LSSI won a contract to manage and operate the San Juan (TX) Public Library. San Juan, a fast-growing community of about 26,000 people, is located on the Texas border with Mexico, and more than 95% of the population is Hispanic. LSSI works closely with the City Manager, Library Advisory Board, and other officials and community groups such as the Friends of the Library to improve library services provided to San Juan’s residents.

The library is housed in a 2500 square foot prefab building. LSSI analyzed the space and made changes to better utilize every square foot. The small library supports 27 state-of-the-art public computers that are constantly used. In the past, the library experienced difficulties complying with Texas state library standards. LSSI worked diligently to bring the library in line with state standards, ensuring eligibility for state and federal grants and funds. LSSI also provides assistance with funding programs.

LSSI recruited and hired an experienced library director, and is working to resolve other issues at the library. The existing space is not large enough to house the library’s entire collection, half of which was previously boxed and inaccessible to staff or patrons. LSSI established an “annex” space for overflow books and materials, and unboxed and organized these items for use by patrons. LSSI has also extended the library’s hours of operation to 56 hours per week.

LSSI established procedures to ensure that the library's operations run more smoothly. Some routine library tasks have been centralized to increase the library’s efficiency and free the on-site staff to provide hands-on in-library assistance to patrons. LSSI created a profile for the library on LSSI’s corporate contracts with all of the leading library book vendors, providing discounts based on LSSI’s total ordering volume. The library uses similar corporate contracts with library and office supply companies to obtain greater discounts on purchases.

LSSI is working with the City to identify and apply for grant funding to assist with the building and furnishing of a new library building.

“What stood out for me was they're experts at libraries. They do nothing but run libraries efficiently and effectively.”

San Juanita Sanchez
Former Mayor
City of San Juan, TX
Public library services in Shasta County date to 1858. In the mid-1980s the effects of Proposition 13 led to the main Redding Library’s closure. Friends of the Shasta County Libraries was formed to provide financial support and volunteers for the library. The Shasta Library Foundation was established to raise funds to build an endowment to supplement library funding. In 1996, after a Grand Jury investigation, the City of Redding and the County of Shasta appointed a Library Review Committee which included in its report a recommendation to build a new library in Redding. California Proposition 14 provided grant money that served as the catalyst for realizing the dream of building an outstanding library to serve the citizens of Redding and Shasta County. New Library Now! provided the organizational structure and leadership needed to raise nearly $4 million in matching funds for the new library. Replacing county funding with local funding, city officials could have made the library a City department; instead, they chose a contract with LSSI as the most cost-effective option to operate the new library as well as the two county branch libraries in Anderson and Burney, CA.

During the transition to the new facility, the library was closed for 2 months while LSSI recruited existing and new staff to prepare the collection for the new library’s enhanced technology. LSSI’s Management Team helped install 82 public computers, public copy centers, and automated equipment including several self-check machines and a nine-bin sorter. Assisted by LSSI, the staff inserted RFID tags in all 120,000 volumes in the library’s collection. The library staff and volunteers worked with county and city officials to prepare a grand opening, which was a huge success. More than 5,000 citizens attended the event to “check out” the new library and its services.

The increase in library hours open and new services including free wireless internet access, community meeting rooms, and new teen and adult programs, have made the library a great attraction. As of spring of 2010, RCLS has increased service hours by more than 50% since the start of the LSSI contract, and circulation has more than doubled. RCLS has also completed a county-wide strategic planning process with input from community leaders.

“I want you to know how much the Advisory Committee and I appreciate this detailed and exciting summary of the activities at the Libraries. Jan has brought the passion and professionalism we have been wanting at Redding.”

Kimberly A. Niemer
Director of Community Services
City of Redding, CA
Appendix C. Recent LSSI Press

- American Libraries Association press release on the selection of the Riverside County Library to host the 2010 Arbuthnot Lecture
- Jackson (TN) Sun newspaper article about a recent Jack London “Big Read” project coordinated by the Jackson-Madison County Library
- Newswire press release about the print-on-demand project in Riverside County, CA
- American Libraries Association press release on the Germantown (TN) Community Library’s selection as a recipient of a special ALA Harry Potter exhibit
- March 2010 article announcing the unanimous vote in Shasta County, CA to renew LSSI’s library operations contract for another five years
- California Council for the Humanities February 10, 2010 article about the new MAD community dialog program being previewed in the Riverside County Library System
August 18, 2009

Contact: Laura Schulte-Cooper
ALSC Program Officer
American Library Association
312-280-2165
lschulte@ala.org

NEWS
For Immediate Release
August 18, 2009

Riverside County (Calif.) Library System to host 2010 Arbuthnot Lecture

CHICAGO - The Riverside County (Calif.) Library System has been chosen to host the 2010 May Hill Arbuthnot Lecture, the Association for Library Service to Children (ALSC), a division of the American Library Association (ALA) announced recently. Kathleen T. Horning, director of the University of Wisconsin-Madison’s Cooperative Children’s Book Center, will deliver the lecture.

“Riverside County’s emphasis on multicultural, literacy-based children’s programming, its leadership in promoting El día de los niños/El día de los libros, Children’s Day/Book Day, and its broad based program Project Read with Me, as well as its strong partnership with the University of California at Riverside, made this an ideal match for Dr. Horning’s expertise and background,” said Kristi Jemtegaard, chair of the 2010 Arbuthnot Honor Lecture Committee.

The lecture will be held in the spring of 2010. Information about the exact date and how to obtain tickets will be posted when available on the ALSC Web site at www.al.org/alsc.

Members of the Arbuthnot Honor Lecture Committee are: Chair Kristi Jemtegaard, Arlington (Va.) Public Library; Marian Creamer, Children’s Literature Alive, Portland, Ore.; Peter Howard, Louisville (Ky.) Free Public Library; Joyce Laiosa, Voorheesville (N.Y.) Public Library; and Lauren Aimonette Liang, University of Utah, Salt Lake City, Utah.
Big Read issues 'Call of the Wild' to Jackson

By MONIQUE LOUMEAU DERR
mlderr@jacksonsun.com
• February 26, 2010

The literacy rate in America is on a rapid decline, according to the National Endowment for the Arts. Education officials have stressed the need for communities to take part in the solution, and that is just what the Jackson-Madison County Library and partnering community organizations are doing.

A program called The Big Read, established by the National Endowment for the Arts in 2007, restores reading to the center of American culture through a monthlong, community-based event.

The library and its partners, with the assistance of an awarded grant, aim to use the program to encourage reading within the Jackson community.

"Reading is essential," said library director Richard Salmons. "Our community needs to instill in our young people the joy of reading."

The book chosen to be read and studied is "The Call of the Wild" by Jack London. The community will have the opportunity to read and discuss it together over the next month.

Installments of the book will be printed in The Jackson Sun over the next month, beginning today.

"Big Read is giving us the opportunity to come together as a community to read, discuss and enjoy a classic novel," said Mary Sood, library communications manager. "It is a wonderful program."

The kickoff for the program was Thursday at the Carnegie Center for Arts and History. The festivities included food, a cheer performance, live music, prizes and a Jack London impersonator.

Free copies of the book were distributed. The kickoff was the starting point for ongoing events to take place over the next four weeks.

The intention is to promote reading among the communities as well as within families. "We hope to spark a fire, to encourage people to pick up a book," said Elizabeth Parnell, children's librarian.

High school cheerleader Aneesa Sood has learned the value of reading. "I didn't read that much and noticed it was hard to write reports," she said. "I started reading more, and it has made it easier to write and do well in school."

Festivities will continue Saturday with a Kids Panning for Gold activity at the library downtown from 2 to 4 p.m. The activity is for children ages 4 and up. Due to limited supplies, registration is required. Call (731) 425-8600, ext. 4, to register.

According to the U.S. Department of Education, students' reading scores go up as the level of home literacy efforts increases. Literacy studies also show that reading material in the home is related to reading performance.

Literacy levels and poverty are strongly associated, as various national studies have shown. According to the Tennessee Department of Education, 26 percent of Tennessee children live in poverty.

Their findings show that out of a typical group of 20 children in poverty, 11 will repeat grades at least once and not graduate high school, and seven will commit street crimes and need incarceration.
Riverside County Library System Begins 'Print-on-Demand' Book Printing

Innovative Pilot Program Funded Through California State Library Grant

TEMECULA, Calif., March 4 /PRNewswire/ -- Library Systems & Services (LSSI), operator of the Riverside County (California) Library System (RCLS), has announced that an innovative new on-demand book printing program begins today at the Grace Mellman Library in Temecula.

Under a $100,000 grant from the California State Library, the RCLS is studying the usefulness of on-demand printing to enhance library collections. The July 2009 grant has been used to purchase a Book Espresso "print-on-demand" machine which prints, covers and binds trade paperback quality books from computer files.

Library patrons will now have the option to request titles, have the book printed for free, read it and return it to the library collection, or they may choose to keep the book and pay a printing fee. If the requesting patron is at the Book Espresso location and wants to pay for the book, it can be printed immediately while they wait.

"Growing our collections based upon patron on-demand choices is a new concept for our library system," said Jan Kuebel, Manager of Grace Mellman Library. "Rather than relying solely on interlibrary loan, we now have a way to immediately respond to patron requests for materials outside of our current collection."

Available book titles will be obtained from Lightning Source, with over 500,000 titles available, and Google Books, who has partnered with over 20,000 publishers to make their content available for on-demand printing.

About Riverside County Library System (RCLS)

The RCLS services library users with thirty-three branch libraries and two bookmobiles throughout Riverside County, California. The library system is a leader in innovative literacy and cultural programs, and winner of innumerable library awards, including the 2008 Raul and Estella Mora Award for childhood literacy, and the 2005 American Library Association’s prestigious John Cotton Dana Library Public Relations Award. The library has also been selected to host the distinguished 2010 ALA/ALSC May Hill Arbuthnot Lecture.

About Library Systems & Services, LLC. (LSSI)

LSSI is the nation's largest operator of public libraries, and has managed the Riverside County Library System for more than a decade. Through a public/private partnership model, LSSI has helped communities across the United States benefit from a nationwide library network, save money, and gain higher return on their library investments. Now in its third decade, LSSI is currently bringing new options to communities and civic leaders struggling to meet the financial and management challenges of this new economy.
Programming Librarian

Featured Library: Germantown Community Library

ALA Public Programs Office | January 05, 2010

The magic of Harry Potter has been brought to life at the Germantown Community Library in Tennessee. The library is hosting "Harry Potter’s World: Renaissance Science, Magic, and Medicine" through January 15. The exhibition explores the Renaissance science, thinkers, and practices that influenced the development of modern Western science. It features beliefs of the fifteenth- and sixteenth-centuries and some of the ethical questions raised in J.K. Rowling’s series. The Germantown Community Library is one of only twelve libraries selected to host the exhibition.

The grand opening of the “Harry Potter’s World” exhibit took place on December 6 with a performance from the Memphis Early Brass Ensemble, an appearance by Harry Potter characters, and a “cup and sorcerer tea room.” On December 8, adults were invited to a presentation on the relationship between medicine and sorcery by Dr. James E. Bailey from the University of Tennessee Health Science Center.

Students were invited to learn about the magic of nanotechnology with a viewing of the Pink Palace Museum’s NanoDay exhibit and hands-on activities. The library also offered students the opportunity to explore Sirius Black’s family tree through the constellations.

The library has several more events lined up for January, including a roundtable on January 7 for educators on how to teach Harry Potter in the classroom. Adults will also have the chance to learn about the use, folklore, and history of medicinal herbs with ethnobotanist Chris Cosby from the Memphis Botanic Garden during the “Mandrake and Mercury” program on January 14. The library is offering teens the opportunity to learn basic fencing from fight choreographer Slade Kyle in “An Introduction to Defense Against the Dark Arts” on January 11.
Harry Potter events are not the only upcoming activities on the Germantown Community Library’s calendar. Story time for younger children, hands-on science activities, technology workshops, book discussions, and scholarly lectures—such as a discussion on the historical female figures of Tennessee, led by the editors of *Tennessee Women: Their Lives and Times*—are also planned for January.

“Harry Potter’s World: Renaissance Science, Magic, and Medicine” is coordinated by the Public Programs Office of the American Library Association in cooperation with the [National Library of Medicine](https://www.nlm.nih.gov). The [ALA Public Programs Office](https://www.ala.org) offers grants that provide the essential resources, funding, visibility, and framework needed for libraries to conduct high-quality cultural programs.
From the Wires

City of Redding Approves Extension of LSSI Library Operations Contract; City Council's Unanimous Vote Applauded by Library Advocates

By: Marketwire.

Mar. 4, 2010 10:11 AM

REDDING, CA -- (Marketwire) -- 03/04/10 -- Library Systems & Services, LLC (www.lssi.com), the nation's leading provider of library management services, today announced that the Redding City Council voted unanimously to extend its library operations contract. The vote, which was taken at the February 22 city council meeting, extends LSSI's operations of the Redding, Anderson and Burney libraries in Shasta County for an additional three years.

"We are grateful for the relationship we have established with the City of Redding to operate its public libraries," said Frank A. Pezzanite, chief executive officer and co-founder of LSSI. "This vote of confidence demonstrates the benefits of the public-private partnership and the priorities that community leaders and residents place on their public libraries in Shasta County."

The library system of Shasta County is unique. The City of Redding manages all three libraries in Shasta County and out-sources the day-to-day operations to LSSI. LSSI provides full-service operation of the libraries including staffing with professional librarians, collection acquisitions, information technology and web master services, volunteer coordination, public relations and janitorial services. LSSI also has facilitated long-range strategic planning efforts and has written successful grant applications to enhance library services.

"This unanimous approval is recognition of the progress and success of the library in the last three years," said Kim Niemer, Redding's director of community services and whose department oversees Redding's contract with both Shasta Public Library System and LSSI. "Over the last two decades, the public libraries were financially unstable," Niemer said, explaining the city's decision to seek a more efficient operations infrastructure. "As a result of the LSSI partnership, Shasta Public Libraries now provide residents in Redding, Anderson and Burney with better service, more convenient hours, new technology, clean facilities, courteous staff, and programs designed by and for their communities."
Speaking at the Redding City Council meeting was Peggy O'Lea, executive director of the Shasta Library Foundation and an original member of several citizen commissions organized in the 1990s to study alternatives to the then County-run library system.

"Since Shasta County and the City of Redding took this course, the support of the public library has soared," said O'Lea. "Increases in library usage, new card holders and volunteerism alone are evidence of satisfaction with public library operations county-wide." Statistics support O'Lea's claims. Shasta County has a population of just over 180,000 with approximately 80,000 library cardholders. An additional 1,000 new library cards are issued each month.

Jim Ceragioli, the acting president of the Friends of the Shasta County Library, also shared his enthusiasm for LSSI and the support provided by library volunteers. "I was originally opposed to outsourcing to LSSI," admits Ceragioli. "But my advice to other communities' Friends of the Library groups, who may share my original skepticism is, 'Go for it!' With this public-private partnership, our libraries are thriving. They are open more hours, vital literacy programs have expanded, and a wonderful environment has been created for library volunteers." In 2009 alone, Ceragioli and 400 other volunteers donated over 25,000 hours of service to Shasta County libraries.

In March 2007, Redding opened a new $20 million state-of-the-art, 56,000 sq. ft. library and also took on the responsibility of operating two additional libraries located in Shasta County. LSSI managed the transition from the previous facility and has since provided operational services for the Redding library, as well as the Anderson and Burney libraries.

"We are proud of the role LSSI is playing in Shasta County's libraries in Redding, Anderson and Burney. We look forward to continuing this public-private partnership to provide outstanding library services to the citizens of Shasta County," Pezzanite stated. "This unanimous vote, along with the support of the community, the Friends, and the Foundation, demonstrates that LSSI and Shasta County share a common vision for the future of the library system."

About LSSI: Founded by library professionals, in 1981, Library Systems & Services, LLC (LSSI) is the country's premier provider of library management services. It is headquartered in Germantown, MD.
THE CALIFORNIA COUNCIL FOR THE HUMANITIES GOES MAD® FOR LIBRARIES!

Libraries are increasingly becoming “community living rooms”—where people can gather to learn about and discuss issues affecting our world.

A new CCH program, Making A Difference (MAD), is designed to help libraries foster thoughtful, informed and civil community dialogue and supported by funding from the Institute of Museum and Library Services—provided through the California State Library—and the National Endowment for the Humanities.

In late 2009, CCH kicked off the MAD pilot program in partnership with the Riverside County Library System, which serves urban, suburban and rural communities. To make a difference in their communities, the libraries will be developing civic engagement public programs on issues of current concern. Each branch library will be responsible for developing its programs and choosing the discussion material, which could be anything from a written text to a film or performance. Over the next few months, participating librarians will share their successes and challenges with each other, seek peer and expert advice, and continue to deepen their practice.

"This program gives us the opportunity to push our programming to a new level," said Riverside County Library Administrator Mark Smith. "As is typical with most library programming, our staff doesn't really interact that much with program participants. We might invite a performer, do the publicity for the event, introduce them and thank them at the end, but that would be the end of it. ["Making a Difference"] directly involves the library staff in part of the programming, in being able to dialogue with the community. This allows us to stimulate a different kind of interest both with our staff and the public."

The MAD pilot program will run through June 2010 and plans are to extend it to other California library systems in the near future.
Green Thumb: White House garden exhibit comes to Collierville

- By Christine Arpe Gang
- Posted January 9, 2009 at 12:05 a.m.

PHOTO BY JOYCE SPINDLER

Not many of us will ever get to tour the gardens covering 18 acres around the White House.

But we can get more than a glimpse of it in a traveling exhibit on display from Saturday through March 8 at the Lucius E. and Elsie C. Burch Jr. Library in Collierville.

The exhibit, organized by the White House Historical Association and the Smithsonian Institution Traveling Exhibition Service, includes reproductions of the original plan drawn by city planner Pierre Charles L'Enfant, historic and contemporary photographs and archival correspondences and text.

Deanna Britton, director of the Collierville library, discovered the traveling exhibit on the Smithsonian's Web site.
"A community library like ours not only provides books and electronic resources, but it also serves as a cultural venue," she said. "Gardening is a big interest in Collierville, I knew it would be a good fit."

The gardens, which have been the site for numerous historical events and informal gatherings, are an important extension of the famous house.

The exhibit puts great focus on three themed gardens: the Rose Garden, the East Garden (also called the Jacqueline Kennedy Garden) and the Children’s Garden.

Some of the biggest names in American landscape design were key figures in the development of the gardens. They include Andrew Jackson Downing, Beatrix Farrand and Frederick Law Olmsted Jr.

Also chronicled are the thoughts and input of several presidents who took keen interest in the gardens:

- Thomas Jefferson designed the first landscape plans.
- John Quincy Adams worked closely with White House gardener John Ousley.
- Theodore Roosevelt reluctantly allowed architects to demolish his cherished conservatory.
- John F. Kennedy made the private Rose Garden near the Oval Office an outdoor meeting place for accommodating up to 1,000 visitors.
- Harry S Truman and George H.W. Bush enjoyed pitching horseshoes in the garden.
- Andrew Jackson had numerous trees and paths installed.

More than 500 trees provide shade and beauty to the grounds, many of them planted for ceremonial purposes, such as a magnolia planted by Andrew Jackson in memory of his wife, Rachel, and a dogwood planted by Bill and Hillary Clinton in 1995 dedicated to the children killed in the Oklahoma City bombing.

The Friends of the Collierville Library, a volunteer support group, agreed to fund the $4,500 exhibit fee and FedEx agreed to ship the exhibit to its next venue.

But you don’t just pay the money and get the goods. Britton sealed the deal last summer after completing voluminous paperwork assuring the Smithsonian and the White House Historical Association the library could meet its requirements for lighting, temperature control and security.

A local collection of porcelain flowers and landscape photographs and paintings by local artists will also be on display during the exhibit.
The library has beefed up its holdings of books and films about the White House. The exhibit catalog will be on sale for $7.

A wonderful series of films and lectures also complements the exhibit. They are free, but registration, starting about two weeks before each event, is required. The lecture series includes:

- Wednesday, 11 a.m. -- Landscaping for Small Spaces with garden designer Tom Pellett.
- Jan. 22, 11 a.m. -- The Bee Friendly Garden with Richard Underhill, owner of Peace Bee Farm.
- Jan. 27, 11 a.m. -- Inviting the Garden Indoors with Lisa Hood and Geraldine Garrison of First Fruit Collection.
- Feb. 2, 1 p.m. -- Cleaning for Spring with master gardener Betty Llewellyn.
- Feb. 12, 1 p.m. -- Drip Irrigation 101 with Phil Botto.
- Feb. 23, 1 p.m. -- Thyme for Tea with Gail Banks of DeSoto Civic Garden Club and the Memphis Herb Society.
- March 2, 1 p.m. -- Native Plants and Butterfly Gardening with Betty Llewellyn.

For a schedule of the films go to collierville.com/library/ and click on the calendar page. The White House Garden exhibit will also be displayed at the James K. Polk Ancestral Home in Columbia, Tenn., in January 2010.

The event is free to botanic garden members; $5 for others.
Appendix D. Confirmation of Receipt of Addendum to the RFP
May 28, 2010

To: RFP # 09-40 Participants

From: Jon Drake

Subject: Addendum #1, TO RFP # 09-40: Stockton-San Joaquin County Public Library Operation Services

PLEASE NOTE: This addendum must be signed and returned with your Proposal. Failure to do so may cause rejection of your Proposal.

This Addendum No.1 forms part of RFP # 09-40 and shall supersede the original specifications of the above entitled RFP wherein it contradicts same.

Responses to Proposer Questions:

1. **Question:** We assume that the statement in Section 1.8.3 on page 9 of the RFP that "all computer hardware will be held by the City" in the event of separate contracts being awarded for City and County library operations refers only to the central site hardware that supports systems operations, not the computer work stations in each branch location. Is our assumption accurate?

   **Answer:** No. Your assumption is not accurate. Section 4 of the "Agreement Between the City of Stockton and the County of San Joaquin - Library Services Agreement" states, in full:

   "It is expressly understood and agreed by and between the parties hereto that CITY owns any/all computer equipment involved in the necessary daily operation of the Library both in CITY and COUNTY branches, and that COUNTY shall be provided access to the services offered by automation through this Agreement."

2. **Question:** Please provide budgetary and financial data (similar to that shown for the County libraries on pages 23-28 of the RFP) for the City of Stockton libraries.

   **Answer:** Revenues & Expenditures information is shown on the following page.
<table>
<thead>
<tr>
<th>Library Operating Fund 041</th>
<th>FY2006-06 Actual</th>
<th>FY2006-07 Actual</th>
<th>FY2007-08 Actual</th>
<th>FY2008-09 Actual</th>
<th>FY2009-10 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenditures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Services</td>
<td>8,557,778.00</td>
<td>8,579,430.00</td>
<td>9,357,578.00</td>
<td>8,224,542.00</td>
<td>7,097,635.00</td>
</tr>
<tr>
<td>Other Services</td>
<td>1,816,756.00</td>
<td>1,896,851.00</td>
<td>2,876,373.00</td>
<td>2,287,310.00</td>
<td>2,241,112.00</td>
</tr>
<tr>
<td>Materials and Supplies</td>
<td>958,088.00</td>
<td>1,272,386.00</td>
<td>1,364,837.00</td>
<td>1,029,830.00</td>
<td>422,128.00</td>
</tr>
<tr>
<td>Other Expenditures</td>
<td>60,079.00</td>
<td>72,129.00</td>
<td>49,080.00</td>
<td>721,901.00</td>
<td>680,676.00</td>
</tr>
<tr>
<td><strong>CITY/COUNTY LIBRARY</strong></td>
<td><strong>11,392,679.00</strong></td>
<td><strong>11,820,596.00</strong></td>
<td><strong>13,747,888.00</strong></td>
<td><strong>12,263,583.00</strong></td>
<td><strong>10,441,551.00</strong></td>
</tr>
</tbody>
</table>

**Revenues**

<table>
<thead>
<tr>
<th>Source</th>
<th>FY2006-06</th>
<th>FY2006-07</th>
<th>FY2007-08</th>
<th>FY2008-09</th>
<th>FY2009-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>City General Fund</td>
<td>6,485,920.00</td>
<td>6,842,644.00</td>
<td>6,702,964.00</td>
<td>5,595,797.00</td>
<td>4,227,451.00</td>
</tr>
<tr>
<td>County Allocation</td>
<td>5,628,671.00</td>
<td>6,000,595.00</td>
<td>6,464,860.00</td>
<td>6,133,094.00</td>
<td>5,260,000.00</td>
</tr>
<tr>
<td>County IPP Allocation</td>
<td>-</td>
<td>-</td>
<td>100,000.00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Books/Materials Fines and Fees</td>
<td>200,700.00</td>
<td>202,206.00</td>
<td>171,922.00</td>
<td>186,058.00</td>
<td>370,000.00</td>
</tr>
<tr>
<td>Public Library Fund</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County Branch Addi Hours Contract</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>334,187.00</td>
<td>155,000.00</td>
</tr>
<tr>
<td>Automation Services Contract</td>
<td>69,030.00</td>
<td>65,535.00</td>
<td>80,661.00</td>
<td>57,431.00</td>
<td>86,000.00</td>
</tr>
<tr>
<td>49-99 Delivery Contract</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>115,000.00</td>
<td>50,000.00</td>
</tr>
<tr>
<td>Ola's Concession Contract</td>
<td>527.00</td>
<td>1,179.00</td>
<td>1,455.00</td>
<td>872.00</td>
<td>1,000.00</td>
</tr>
<tr>
<td>E-Rate Rebates</td>
<td>6,162.00</td>
<td>6,199.00</td>
<td>39,821.00</td>
<td>7,901.00</td>
<td>75,000.00</td>
</tr>
<tr>
<td>Other Revenue/Reimbursements</td>
<td>18,630.00</td>
<td>6,694.00</td>
<td>39,367.00</td>
<td>19,853.00</td>
<td>26,100.00</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td><strong>12,519,160.00</strong></td>
<td><strong>13,474,577.00</strong></td>
<td><strong>13,674,336.00</strong></td>
<td><strong>12,599,612.00</strong></td>
<td><strong>10,441,551.00</strong></td>
</tr>
</tbody>
</table>

The workload information included on pages 24 & 27 of the RFP reflect system-wide data as opposed to being specific to the County branches. There is no additional information to provide.

City Branch hours for two-year period:

<table>
<thead>
<tr>
<th></th>
<th>2008-09 Weekly Hours</th>
<th>2009-10 Weekly Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anglou</td>
<td>36</td>
<td>16</td>
</tr>
<tr>
<td>Chavez</td>
<td>51</td>
<td>36</td>
</tr>
<tr>
<td>Fair Oaks</td>
<td>36</td>
<td>23</td>
</tr>
<tr>
<td>Troke</td>
<td>47</td>
<td>35</td>
</tr>
<tr>
<td>Weston Ranch</td>
<td>36</td>
<td>25</td>
</tr>
</tbody>
</table>

Information about proposed hours of operation at City branches for FY 10/11 is yet to be determined pending Council decision on available funding.
The information about items purchased per branch on pages 25 & 28 of the RFP report on materials purchased through the County’s Intergovernmental Partnership Program wherein cities in the County appropriate funding for library materials and the County government matches those appropriations on a dollar for dollar basis up to $100,000. There is no comparable City number to provide.

3. **Question:** Please provide the information on the number of programs and program attendance for the City of Stockton branch libraries similar to the data for the County libraries found on pages 34 and 35 of the RFP.

**Answer:**

**2008 - 2009 Library Services Statistics**

<table>
<thead>
<tr>
<th></th>
<th>Angelou</th>
<th>Fair Oaks</th>
<th>Chavez</th>
<th>Troke</th>
<th>Weston Ranch</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>12</td>
<td>34</td>
<td>25</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>August</td>
<td>9</td>
<td>16</td>
<td>19</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>September</td>
<td>12</td>
<td>24</td>
<td>22</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>October</td>
<td>14</td>
<td>27</td>
<td>31</td>
<td>5</td>
<td>15</td>
</tr>
<tr>
<td>November</td>
<td>14</td>
<td>14</td>
<td>21</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>December</td>
<td>10</td>
<td>22</td>
<td>13</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>January</td>
<td>10</td>
<td>25</td>
<td>11</td>
<td>No Data</td>
<td>8</td>
</tr>
<tr>
<td>February</td>
<td>11</td>
<td>32</td>
<td>13</td>
<td>13</td>
<td>19</td>
</tr>
<tr>
<td>March</td>
<td>14</td>
<td>26</td>
<td>21</td>
<td>19</td>
<td>25</td>
</tr>
<tr>
<td>April</td>
<td>13</td>
<td>24</td>
<td>22</td>
<td>19</td>
<td>32</td>
</tr>
<tr>
<td>May</td>
<td>6</td>
<td>21</td>
<td>23</td>
<td>19</td>
<td>18</td>
</tr>
<tr>
<td>June</td>
<td>8</td>
<td>16</td>
<td>18</td>
<td>No Data</td>
<td>18</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>133</strong></td>
<td><strong>281</strong></td>
<td><strong>241</strong></td>
<td><strong>106</strong></td>
<td><strong>185</strong></td>
</tr>
</tbody>
</table>

**Program Attendance**

<table>
<thead>
<tr>
<th></th>
<th>Angelou</th>
<th>Fair Oaks</th>
<th>Chavez</th>
<th>Troke</th>
<th>Weston Ranch</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>451</td>
<td>629</td>
<td>1093</td>
<td>352</td>
<td>295</td>
</tr>
<tr>
<td>August</td>
<td>21</td>
<td>315</td>
<td>455</td>
<td>366</td>
<td>259</td>
</tr>
<tr>
<td>September</td>
<td>168</td>
<td>230</td>
<td>636</td>
<td>183</td>
<td>394</td>
</tr>
<tr>
<td>October</td>
<td>300</td>
<td>314</td>
<td>639</td>
<td>216</td>
<td>444</td>
</tr>
<tr>
<td>November</td>
<td>120</td>
<td>122</td>
<td>486</td>
<td>289</td>
<td>141</td>
</tr>
<tr>
<td>December</td>
<td>298</td>
<td>223</td>
<td>611</td>
<td>110</td>
<td>205</td>
</tr>
<tr>
<td>January</td>
<td>291</td>
<td>203</td>
<td>351</td>
<td>No Data</td>
<td>101</td>
</tr>
<tr>
<td>February</td>
<td>114</td>
<td>250</td>
<td>413</td>
<td>235</td>
<td>327</td>
</tr>
<tr>
<td>March</td>
<td>311</td>
<td>302</td>
<td>823</td>
<td>555</td>
<td>530</td>
</tr>
<tr>
<td>April</td>
<td>189</td>
<td>219</td>
<td>860</td>
<td>460</td>
<td>770</td>
</tr>
<tr>
<td>May</td>
<td>70</td>
<td>235</td>
<td>985</td>
<td>705</td>
<td>403</td>
</tr>
<tr>
<td>June</td>
<td>176</td>
<td>238</td>
<td>799</td>
<td>No Data</td>
<td>409</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2509</strong></td>
<td><strong>3280</strong></td>
<td><strong>8151</strong></td>
<td><strong>3471</strong></td>
<td><strong>4278</strong></td>
</tr>
</tbody>
</table>
4. **Question:** How many copies of the technical and cost volumes should we submit?

**Answer:** Submit an Original plus seven copies. Also submit an electronic version that has been saved to a disk.

5. **Question:** Please update your information about the operations and costs of the Bookmobile. In order to provide initial Bookmobile costs, ongoing Bookmobile operational expenses, etc., as require in Section 1.10.5 of the RFP, it would be helpful if you could provide us with a description of the current Bookmobile - its size, the size of the bookmobile collection, the scheduled routes and stops it currently makes in the County and any other information you have pertaining to the operations of the Bookmobile services. We assume the Bookmobile will only have to be replaced if the County ultimately decides to go with Option b). Operate a separate San Joaquin County Public Library System.

**Answer:** The bookmobile is a 2006 vehicle and is 34 feet long. Max capacity is 4,000 items. It circulates around 20,000 items a year. There are three currently scheduled routes:

- Clements (3rd & East Hwy 88, Clements) - Bear Creek (Parkdale & Lockewood, Lockeford) - Lockeford - Cotton & Laird, Lockeford)

- O'Connor Woods (3400 Wagner Heights, Stockton) - Weberstown East Park (Surrey Lane & Dorsett, Stockton) - Baxter Park (Whistler & Muir Woods, Stockton)

- Lathrop Market Place (I-5 & Louise Ave, Lathrop) - Lathrop Community Center (5th & K, Lathrop)

The first route above runs every Thursday while the second and third routes run on alternate Friday's.

Bookmobile costs are shown on the following page

(THIS AREA INTENTIONALLY LEFT BLANK)
Bookmobile Estimated Annual Operating Cost

<table>
<thead>
<tr>
<th>Staff Costs</th>
<th>% of Staff Cost Expended on Bookmobile</th>
<th>Bookmobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>City Librarian</td>
<td>1.0%</td>
<td>1,541.84</td>
</tr>
<tr>
<td>Supervising Librarian</td>
<td>7.5%</td>
<td>9,273.66</td>
</tr>
<tr>
<td>Library Assistant</td>
<td>40.0%</td>
<td>36,273.84</td>
</tr>
<tr>
<td>Circulation Assistant</td>
<td>55.0%</td>
<td>46,939.13</td>
</tr>
<tr>
<td>Part-time Staff</td>
<td>100.0%</td>
<td>1,512.00</td>
</tr>
</tbody>
</table>

Other Expenditures

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle Rental</td>
<td>20,000.00</td>
</tr>
<tr>
<td>Fuel</td>
<td>5,000.00</td>
</tr>
<tr>
<td>Bookmobile Phone</td>
<td>700.00</td>
</tr>
<tr>
<td>Publicity and Advertising</td>
<td>3,000.00</td>
</tr>
<tr>
<td>Materials and Supplies</td>
<td>500.00</td>
</tr>
<tr>
<td>Library Materials</td>
<td>20,000.00</td>
</tr>
</tbody>
</table>

| Total Other Expenditures      | 49,200.00  |

| Staff Costs plus Other Expenditures | 144,440.46  |
| Indirect Cost                   | 3.30%       |

TOTAL ANNUAL COST 149,207.40

6. **Question:** As directed on page 4 of the RFP, we will suggest constructive uses for the remaining fund balance of $400,000. Are there restrictions on the use of these funds, such as type of expenditure or timeframe?

**Answer:** Expenditure of these funds are subject to approval by the County Administrator’s Office and the County Board of Supervisors.

END ADDENDUM #1

Please contact me if you have any questions, (209) 468-3250.

/ Frank A. Pezzanite
Signature

Library Systems & Services, LLC

Company Name
Appendix E. LSSI Sample
Library Administration and Operations Agreement
LIBRARY ADMINISTRATION AND OPERATIONS AGREEMENT

This Agreement is made as of _____________, 2010 between:

LIBRARY SYSTEMS & SERVICES, LLC, a Maryland limited liability company with a mailing address at 12850 Middlebrook Road, Suite 400, Germantown, Maryland 20874, Attention: Frank A. Pezzanite, President, an e-mail address at frank.pezzanite@lssi.com and a fax number of 301-540-5522 (“LSSI”); and

__________________________, with a mailing address at

__________________________, Attention: __________________________, an e-mail address at __________________________ and a fax number of __________________________ (“Customer”). LSSI and Customer are each sometimes referred to herein as a “Party” and collectively, the “Parties”.

The Parties agree as follows:

1. Services and Warranty.

(a) Services. During the Term of this Agreement, LSSI will provide the labor and administrative services described on Schedule A (collectively, “Services”).

(b) Warranty on Services. LSSI warrants that it will perform the Services with at least the care, diligence and expertise generally accepted in the library service industry.

(c) Provision of and Warranty on Goods. LSSI may purchase goods for use in the administration and operation of the Library (as defined below). Title to all items purchased by LSSI shall at all times reside in Customer. If LSSI furnishes any goods to Customer, LSSI will use good faith efforts to extend the manufacturer’s warranty, if any, to Customer. There are no other warranties, express or implied, including warranties of merchantability or fitness for particular purpose.

2. Term and Termination.

(a) Term. This Agreement shall commence on _____________, 2010 (“Effective Date”), and continues in force until ____________, 20__ (“Expiration Date”), unless sooner terminated in accordance with this Section 2.

(b) Termination for Convenience. Either Party may terminate this Agreement after twelve (12) calendar months from the Effective Date with or without cause by giving the other Party six (6) calendar months written notice of termination prior to the end of Customer’s fiscal year which ends in the month of June.

(c) Termination for Default. If either Party breaches any material provision of this Agreement and fails to correct the breach within thirty (30) days after receiving written notice specifying the breach (or, if the breach cannot be corrected within thirty (30) days, fails to progress diligently towards correction), then the other Party may terminate this Agreement by giving written notice to the breaching Party, except that LSSI shall have the right to terminate this Agreement if Customer fails to pay any amount due LSSI and such failure continues for ten (10) days after written notice thereof.
(d) **Renewal.** Subject to the termination provisions in accordance with this Section 2, this Agreement shall automatically renew and the Expiration Date extended for successive renewal periods equal in duration to the original term of this Agreement, unless written notice of intent to not renew is given at least six (6) calendar months prior to the Expiration Date.

3. **Price and Payment.**

   (a) **Price.** LSSI shall perform the Services for the Charges (exclusive of any current or future taxes) set forth in Section E of Schedule A.

   (b) **Payments.** Upon the execution of this Agreement, LSSI shall invoice Customer for the Execution Amount set forth in Section E of Schedule A. LSSI shall invoice Customer prior to each month’s service for the monthly amount set forth in Section E of Schedule A. Invoices shall be paid by bank wire transfer to a bank account designated by LSSI on or before the fifth (5th) day of such month (the “Due Date”) and shall bear interest at the rate of one and one quarter percent (1 1/4%) per month if not paid in full by the Due Date. If LSSI has not received payment by the Due Date, it may suspend disbursements contemplated under this Agreement until full payment has been received. LSSI shall add to its invoices any current or future taxes (other than LSSI’s income tax) payable by LSSI on account of this Agreement, the Services, or Customer’s payments hereunder, except to the extent Customer furnishes in advance a valid certificate of exemption from such taxes.

4. **Insurance and Mutual Indemnification.**

   (a) **Insurance.** During the term of this Agreement, LSSI shall maintain in force at its own expense comprehensive general liability insurance coverage of at least two million dollars ($2,000,000) combined single limit.

   (b) **Mutual Indemnification.** It is the intention of this Agreement that LSSI shall not become liable for any obligations or liabilities of Customer except to the extent LSSI’s gross negligence, uncured breach of contract or other wrongful act directly caused such obligation or liability. Except to the extent that a Party’s gross negligence, uncured breach of contract or other wrongful act directly caused such indemnified obligation or liability as described below, each Party agrees to indemnify and hold the other Party and its affiliates and the respective officers, directors, members, employees, agents and representatives of each of the foregoing harmless from and against any and all costs, expenses, losses, claims, damages, penalties, fines, liabilities and obligations whenever arising or incurred (including, without limitation, amounts paid in settlement, costs of investigation and attorneys’ fees and expenses) arising out of or relating to (i) any material breach of, or omission from, any representation, warranty, covenant, obligation or agreement of such Party as set forth herein or in any related schedule, or set forth in any other document entered into or delivered in connection with this Agreement; (ii) any claim or cause of action by any member, officer, director, employee or affiliate of such Party arising out of or related to any act or omission of such Party or the Services or transactions contemplated hereby; (iii) any liability or obligation of such Party; (iv) any injury or death of any person (except losses covered by worker compensation insurance) or loss or damage of any property in performance of this Agreement; and (v) any matter of any kind whatsoever arising or accruing before the execution of this Agreement.
(c) Property Insurance. Customer agrees to keep its buildings and their contents insured against loss, cost, damage or expense resulting from fire, explosion or any other casualty in an amount equal to the full replacement cost thereof ("Casualty Insurance"). If any loss, cost, damage or expense resulting from fire, explosion, or any other casualty or occurrence is incurred by Customer in connection with its buildings or their contents, then Customer hereby releases LSSI from any liability it may have on account of such loss, cost, damage or expense to the extent of any amount receivable by reason of such Casualty Insurance, and waives any right of subrogation which might otherwise have existed or accrued to any person on account thereof.

5. Information, Intellectual Property and Employees.

(a) Information. In the performance of this Agreement, LSSI may be exposed to information regarding the identity of Customer’s patrons, Customer may be exposed to information regarding LSSI’s proprietary library management techniques, and either Party may be exposed to other information designated in writing by the disclosing Party as confidential (collectively, “Confidential Information”). Each Party shall: (1) use the same care to protect the other Party’s Confidential Information from disclosure that such Party uses to protect its own information of like importance; (2) limit duplication of Confidential Information to the extent needed to perform this Agreement; (3) disclose Confidential Information only to employees having a need to know in connection with performance of this Agreement, and who are informed of the contents of this provision prior to disclosure. This provision shall survive termination or expiration of this Agreement; and, on such termination or expiration, each Party shall return all Confidential Information, including all copies, to the owner of such information, and if requested, shall certify in writing that all such information has been returned. Because the damage resulting from a breach of this provision would be difficult or impossible to quantify and remedy at law, in case of such breach, or the threat of such breach, the Party whose Confidential Information is threatened to be disclosed shall be entitled to injunctive or other equitable relief.

(b) Intellectual Property. Nothing in this Agreement confers any license or right to use any trademark, service mark, copyright or other intellectual property right, whether now owned or hereafter developed, of either Party.

(c) Employees. Customer shall not actively solicit to hire any employee of LSSI during the term of this Agreement or for a period of six (6) months after termination or expiration of this Agreement, unless such employee previously was an employee of Customer.

6. Customer’s Obligations.

(a) Facilities, etc. Customer shall make available to LSSI without charge, solely for LSSI’s use in performing the Services, all properties, facilities, equipment, collections, supplies, records, files and data used or useful in the operation of the Library that is in Customer’s possession, custody or control as of the date hereof. Customer reserves all ownership rights in such properties and LSSI shall return such properties to Customer, ordinary wear and tear excepted, at the termination or expiration of this Agreement.

(b) Revenue Generating Opportunities. Customer shall make available to LSSI without charge adequate space in the Library to develop and implement new revenue generating services, such as services to the business community, retail sales (books, gifts, refreshments, etc.) and other fee based services, to benefit the community, Customer and
LSSI ("Additional Services"). Customer will use its best efforts to assist LSSI in the promotion and implementation of these Additional Services. Customer shall have the final approval of all Additional Services, with such approval to not be unreasonably withheld, conditioned or delayed. Unless otherwise approved by Customer, the provision of these Additional Services shall not in any way substantially reduce the space or Library services provided prior to the implementation of these Additional Services.

7. Miscellaneous.

(a) Independent Contractors. The relationship of the parties is that of independent contractors, and no partnership, joint venture, agency, employment, or other relationship is intended.

(b) Assignment. Neither Party may assign this Agreement to a third party not affiliated with such Party without the prior written consent of the other Party, except that LSSI may subcontract or delegate portions of the Services; provided, however, that in no case shall Customer be liable to any party other than LSSI, or for any amount in excess of the price specified on Schedule A, plus any additional charges permitted hereunder.

(c) Limitation of Liability. In no case shall either Party be liable for any damages, losses, costs or expenses under or in connection with this Agreement, whether for breach of contract, tort or otherwise in excess of an amount equal to the lesser of (i) the actual damages suffered by the aggrieved Party, or (ii) the Charges for the twelve (12) month Period (as shown in Schedule A, as it may be amended) in which such damages were allegedly incurred. In no case shall either Party be liable for any punitive, exemplary, incidental, consequential, or special damages arising out of or in connection with this Agreement. Notwithstanding any other provisions of this Agreement, LSSI shall have no responsibility for any worker's compensation or any other claims for incidents or costs, expenses or losses occurring prior to the Effective Date.

(d) Force Majeure. LSSI shall not be liable for any failure or delay in performance of this Agreement due to causes beyond its control, including, but not limited to, strike, war or civil disturbance, weather emergency, or general failure of any necessary supply, service or utility.

(e) Customer's Representation. Customer represents and warrants that it has all necessary legal authority to enter into and perform this Agreement and that the person executing this Agreement on its behalf is legally authorized to do so.

(f) Notices. Notices required or permitted under this Agreement shall be effective upon the third (3rd) business day after deposit in First Class mail, or the next business day after deposit with a recognized overnight courier, or upon receipt if e-mailed or faxed to the respective e-mail addresses or fax numbers, if addressed to the parties' respective addresses and marked to the attention shown on the first page of this Agreement.

(g) Law and Enforceability. This Agreement shall be governed by and construed in accordance with the laws of the State of _________________. If any provision of this Agreement is conclusively determined to be illegal, invalid or unenforceable, then such provision shall be severed, and the remaining provisions of this Agreement shall be so construed to carry out, as nearly as legally permitted, the intentions of the parties.
(h) **Survival.** The provisions of Sections 2, 3, 4, 5 and 6 shall survive any termination or expiration of this Contract.

(i) **Entire Agreement.** This Agreement contains the entire understanding of the parties on the subject matter hereof and supersedes all prior statements and agreements on that subject. No failure or delay by either Party in enforcing any provision of this Agreement shall operate as a waiver. This Agreement may be modified or waived only in writing signed by the Party against whom such modification or waiver is sought to be enforced.

Intending to be legally bound, the parties have caused this Agreement to be executed by their duly authorized representatives.

______________________________
LIBRARY SYSTEMS & SERVICES, LLC

By: ____________________________
Name: __________________________
Title: __________________________

By: ____________________________
Name: Frank A. Pezzanite
Title: President
Schedule A

Agreement for Library Administration and Operations

A. Statement of Work

LSSI will administer the operations of Customer’s library facilities (collectively, “Library”), including the accounting for, purchase of and payment for payroll services and goods and services from vendors for budgeted utilities, supplies, repairs, maintenance, Library Materials (as defined below) and Capital Items (as defined below) sufficient to operate the Library in accordance with the policies and guidelines approved by Customer.

LSSI shall provide, by and through its own employees or independent contractors ("LSSI Staff") any labor LSSI deems necessary for the operation of the Library. The cost of the LSSI Staff shall be paid by LSSI and is included in the Operating Budget (as defined below). LSSI shall have the sole and absolute right to hire and/or terminate the employment of the Library Staff from time to time to perform work under this Agreement. LSSI will provide the appropriate staffing levels to keep the Library open to the public during the following periods and for the following hours of operation:

<table>
<thead>
<tr>
<th>Period</th>
<th>Hours of Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Branch</td>
</tr>
<tr>
<td>July 1, 2010 – June 30, 2010</td>
<td></td>
</tr>
</tbody>
</table>

In addition during the second year of operations, LSSI will develop a long-range plan for Customer in cooperation with Customer, elected and appointed local officials, other community stakeholders and the Library Staff (“Plan”). Using current professional standards and practice, the Plan will identify challenges and opportunities for the Library staff and corresponding strategic responses, including specific, measurable goals and objectives.

This Plan, when approved by Customer, will help govern the direction and focus of the Library Staff in fulfillment of their mission of providing effective and efficient Library service to meet the personal, professional and lifelong learning needs of the citizens served by the Library.

B. Scope of Work

1. Governance – Develop and maintain effective working relationships with local staff, elected officials, Library board members, other appointed officials and community groups such as the Friends of the Library, members of the genealogical society, etc.

2. Fiscal Responsibility:
   a. Develop and maintain effective and efficient financial procedures.
   b. Review all aspects of Library operation and service for efficiency and cost-effectiveness while making changes as appropriate.
   c. Lead preparation of annual operating and capital budget requests.
d. Continue to seek innovative means of adding value to Customer at little or no additional cost, including the procurement of grants.

3. Management and Reporting:
   a. Prepare and provide regular reports to Customer, describing Library activities and recommending changes in policies, procedures and operations as necessary and appropriate.
   b. Prepare and provide timely statistical reports to the Customer on Library activities.

4. Staff Development and Coaching:
   a. Support orientation and professional development of all Library Staff.
   b. Provide leadership and guidance to maximize Library Staff effectiveness in Library operations.

5. Public Services:
   a. Provide prompt, friendly and accurate assistance in the use of the Library.
   b. Provide prompt and accurate circulation, information and reference services.
   c. Provide requested materials promptly.

6. Collections – Provide high quality materials on a wide variety of subjects in varied formats for all age groups present in the community, according to established collection management plans.

7. Programming – Provide high quality, effective educational, recreational and cultural programs of interest to all age groups present in the community.

8. Information Technology – Develop and implement short and long range plans to procure, install and support sufficient hardware, software, network, telecommunications and other resources necessary to support the Library Staff’s mission.

9. Marketing – Effectively disseminate information and promote use of the Library, resources and services.

10. Facilities – Work with Library Staff and local officials to ensure effective building maintenance by promptly identifying and reporting problems with the physical plant.

C. Excluded Services

LSSI shall have no responsibility for administration, purchase or payment of, or any liability or duty to defend claims for:

1. Any goods or services, including payroll, that were rendered to Customer prior to the Effective Date.

2. Unfair labor practices, grievances, or any claims or litigation whatsoever arising out of the hiring and/or firing, layoff, subcontracting, assignment, reassignment or discipline of the Library Staff not
employed by LSSI, provided that such claims have not resulted from negligence or wrongful acts of LSSI under federal, state, or municipal law.

3. Any worker’s compensation claims from any Library Staff arising from injuries sustained prior to the Effective Date.

4. Any costs of any voluntary retirement incentives, employee buyouts or other similar programs adopted by Customer.

5. Any Capital Items, which shall mean any capital acquisitions, improvements or replacements of any of the properties, facilities, equipment, furniture, furnishings, fixtures or leasehold improvements of the Library.

6. Any amount of costs for unbudgeted repairs, maintenance and/or upkeep of Capital Items owned by Customer.

7. Any increases in the cost of insurance, utilities, rent, fuel and any state or federal tariff items over the rate for such items prevailing as of the date of execution of this Agreement.

D. Library Materials and Materials Handling Fee

On behalf and for the benefit of Customer, LSSI will negotiate favorable discounts and prices from Library suppliers for the purchase of all Library materials, which shall include books, periodicals, newspapers, e-books, microforms, electronic database subscriptions, standing orders, audio and video materials and cases, automated reference services, binding, cataloging and processing, shipping costs and the Materials Handling Fee (as defined below) (collectively, “Library Materials”). The responsibility for Library collection development policies will remain with Customer, and all Library Materials selections will be the responsibility of LSSI. LSSI will place orders with the suppliers and perform the accounting functions related to those orders, including prompt payment of the invoices. In accounting for the cost of the Library Materials, LSSI shall include a fee of five percent (5%) of the cost of the Library Materials ordered (“Materials Handling Fee”).

E. Operating Budget and Charges

<table>
<thead>
<tr>
<th>Period</th>
<th>Charges (“Operating Budget”)</th>
<th>Minimum Library Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1, 2010 – June 30, 2011</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

* Total cost of Library Materials is included in the Operating Budget and shall include the Materials Handling Fee.

The Operating Budget is contingent on other existing contractual terms, obligations and responsibilities remaining the same except as expressly noted herein.

Prior to five (5) months before the end of the last Period to which the amount of Charges have been agreed upon, the Parties shall begin to negotiate in good faith the amount of Charges that will apply to the next Period. If the Parties have not reached such agreement three (3) months before the end of such Period, then the Charges for the next twelve (12) month Period, or such fewer number of months remaining until the Expiration Date (“Remaining Months”), shall be equal to the Charge for the last month of such Period multiplied by twelve (12) or by the number of Remaining Months, whichever is less, plus a Cost of Living escalator.

SuNl1205 LIBRARY SERVICES AGREEMENT 6-1-10.docx Schedule A – Page 3
Appendix F. List of Three References
REFERENCES

SIMILAR CONTRACTS/RFPs PERFORMED: List below contracts under which the Proposer has provided similar services during the past three (3) years.

Proposer’s financial stability, technical and support capabilities will be verified through reference checking, which may include site visits and contact with other clients or vendors.

FIRM NAME: Riverside County Library System
ADDRESS: 4080 Lemon St., Riverside, CA 92501
PHONE NUMBER: 951-955-8916  Email Address: kgallavan@rivco2eda.org
CONTACT PERSON: Teresa Gallavan, County Librarian
DATE OF CONTRACT: 7/1/1998 through underway

FIRM NAME: Jackson County, Oregon
ADDRESS: 10 S Oakdale, Medford, OR 97501
PHONE NUMBER: 541-774-6003  Email Address: jordand@jacksoncounty.org
CONTACT PERSON: Danny Jordan, County Administrator
DATE OF CONTRACT: 10/1/2007 through underway

FIRM NAME: Shasta County, CA
ADDRESS: 1100 Parkview Avenue, Redding, CA 96001
PHONE NUMBER: 530-246-0146  Email Address: libraryfoundation@shasta.com
CONTACT PERSON: Peggy O'Lea, Library Foundation Director
DATE OF CONTRACT: 8/31/2006 through underway
Appendix G.  Non-Collusion Affidavit
NON-COLLUSION AFFIDAVIT

(Title 23 United States Code Section 112 and Public Contract Code Section 7106)

In accordance with Title 23, United States Code Section 112, and Public Contract Code 7106, the bidder declares that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or solicited any other proposer to submit a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other proposer, or to fix any overhead, profit or cost element of the proposal price, or of that of any other proposer, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted their proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

NOTE: The above Non-collusion Affidavit is part of the Proposal. Signing this Proposal on the signature portion thereof shall also constitute signature of this Non-collusion Affidavit.

Proposers are cautioned that making a false certification may subject the certifier to criminal prosecution.

Proposer’s Signature  

Date June 10, 2010